



The University of Lethbridge



2008 – 2012 Business Plan



University of
Lethbridge





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Executive Summary

ABOUT THE UNIVERSITY

The University of Lethbridge, a member of the system of Alberta universities, offers undergraduate degrees in the humanities, social sciences, natural sciences, and mathematics; certificates, diplomas, and undergraduate degrees in education, fine arts, health sciences, management and nursing; and graduate degrees at the Master's and Doctoral levels. A Board-governed institution, the U of L operates under the *Post-Secondary Learning Act*, a government-approved Mandate Statement, Mission and Vision statements, and a Strategic Plan. The University of Lethbridge continues to build on its reputation as an exceptional research and teaching university.

With a focus on liberal education, smaller class sizes, co-op placements, excellence in teaching, and student involvement in research, The University of Lethbridge provides top-quality education. Our faculty and students are recognized nationally and internationally through their achievement of awards, scholarships, and professional appointments.

GOALS AND PERFORMANCE MEASURES

To help effectively address opportunities and challenges, The University of Lethbridge has set a series of goals, with associated actions and expected results. The institutional goals are: (1) accessibility; (2) academic excellence; (3) research excellence; (4) strengthen community and public relations; (5) improve student services; (6) facilities and equipment renewal; and (7) operate responsibly and responsibly.

The U of L uses eight performance measures to assess its progress related to the goals: (1) enrolment; (2) graduate satisfaction; (3) graduate participation and employment rates; (4) administration expenditures; (5) citation index; (6) research intensity; (7) research impact; and (8) research council grants. Annual reports track yearly progress on these performance measures.

BUDGET

The University of Lethbridge presents a balanced budget for the 2008-09 fiscal year. The \$144.9M general operating budget is an increase of 9.3% over the previous year. As in previous years, budget decisions were made after consulting with the institution's various budget units and within the context of the U of L's Strategic Plan.

Using conservative budget assumptions, reductions may be required in 2010-11 and 2011-12. The University of Lethbridge is dedicated to cost containment, fiscal responsibility, and continuous quality improvement.

CAPITAL PROJECTIONS

The U of L is facing an acute space crisis, with assignable space not keeping pace with the growing number of students, faculty, and staff. Available and appropriate space for research has also put strain and demand on current facilities; hence a new science complex, constructed to house and accommodate the research needs of our faculty and students, is the University's top capital priority. Another issue is deferred maintenance cost and actual funding for facilities maintenance that is only a fraction of the ideal funding levels.

The U of L has identified six priority capital projects for the next ten-year period:

1. Science Complex.
2. Alberta Water and Environmental Sciences Building (phases 2 and 3).
3. Central Plant Facility.
4. Student Residences.
5. Art Gallery.
6. Office/Classroom Complex.

These projects will help accommodate future planned expansion and continue The University of Lethbridge's commitment to meeting the challenge of increased demand for postsecondary education.

TUITION PROJECTIONS

For 2008-09, the U of L estimates it will collect about \$36.4 M in instructional fee revenue and non-mandatory student fees, an increase of 2.6% over the previous year. This rise is due to increases in fee rates and credit hour increases in the academic units.

ENROLMENT PLAN

The University of Lethbridge has proposed general expansions in all faculties and schools to help address unmet market demand.

1.0 Institutional Context

1.1 MANDATE STATEMENT

The University of Lethbridge is a Board-governed institution functioning under the Universities Act as a member of the system of Alberta universities. It offers instructional programs at the Bachelor's level in the humanities, the social sciences, the natural sciences, and mathematics within its Faculty of Arts and Science. It also awards University certificates, diplomas, and undergraduate degrees in Education, Fine Arts, Health Sciences, Management, and Nursing. At the graduate level, The University of Lethbridge offers a Master of Education (MEd), Master of Arts (MA), Master of Science (MSc) and a special case Doctor of Philosophy (PhD). It stimulates and supports basic research and scholarly activity in all disciplines in which it gives instruction, and conducts certain lines of applied research of special relevance to the region or to the province.

The University offers collaborative programs with various community colleges, including post-diploma degrees in Agricultural Studies, Environmental Science, Fine Arts, Management, and Nursing. It encourages, through its Management, Education, and Arts and Science faculties, active development of educational opportunities in Native American Studies for Native American students through off-campus and on-campus programs.

The University of Lethbridge provides non-credit continuing education programs throughout the region. It also supports artists' workshops and makes its cultural programs and facilities available to the wider community.

Approved by the Minister, May 23, 2001

1.2 MISSION

The University of Lethbridge exists to develop individuals who are creative and inventive discoverers, leaders and independent learners, well prepared to contribute significantly to their local, national, and global communities. We, The University of Lethbridge, care about what our students, staff, and faculty need to achieve this goal. Thus, we provide excellent programs with a liberal education focus, outstanding and inspirational teaching, intellectual horizons that extend far beyond the boundaries of our community, quality services, an inclusive and diverse campus within a climate of respect, high quality facilities and resources, and a commitment to responsible action.

The University also has a social responsibility to protect free inquiry and scholarship, and to push the frontiers of current knowledge through innovative research. Taking this responsibility seriously, we cultivate a community that fosters intellectual exchange, creativity, originality, and discovery.

1.3 VISION

The University of Lethbridge strives to build the most vital and engaging learning environment in Canada, through superior teaching, research, and creative achievement.

1.4 STRATEGIC PLAN

The result of an extensive and consultative process, The University of Lethbridge Strategic Plan 2003-2008 contains the Mission, Vision, Fundamental Principles, and Strategic Priorities. For the complete Strategic Plan, see Appendix One (page 43).

As of the date of publication, the U of L is working, through its Strategic Planning Committee, on revising the Strategic Plan for 2008-12.

2.0 Opportunities and Challenges

OPPORTUNITIES

Leadership in Research

The University of Lethbridge is committed to being a leader in research. Guided by its Strategic Research Plan, and driven by its success in research funding, the U of L will expand its research in areas of special expertise and of relevance to the province or region.

To capitalize on expertise across disciplinary boundaries, the U of L will strive to develop centres of research excellence that span a wide range of disciplines. One example of this is the University's founding role in the Water Institute for Semi-Arid Ecosystems.

The University of Lethbridge has the opportunity to reinforce its position as one of the leading smaller research institutions in Canada.

Leadership in Technology

The University of Lethbridge continues to be a leader in the effective use of technology to support learning, with high bandwidth Internet access for all students, faculty, and staff, and state-of-the-art classrooms. In particular, the U of L is a provincial leader in videoconferencing, a technology that enables interactive audiovisual meetings with sites worldwide via high speed networks or telephone lines. The U of L will persist in technology leadership, which brings tremendous opportunities to expand the institution's tradition of excellence.

Leadership in First Nations Participation

With its ongoing positive relationships with and proximity to First Nations communities, the U of L has the opportunity to be a leader in encouraging and supporting the participation of First Nations people in university education.

Enrolment Growth

Growth in U of L enrolment provides several opportunities:

New or expanded programs—With increasing student enrolment, the U of L has the opportunity to consider expanding existing programs and developing new ones.

Attraction and retention—Potential students and faculty may view a growing university as a more dynamic and desirable environment in which to study and work.

New talent and ideas—A growing student and faculty body infuses new talent and ideas into the U of L.

Increased reputation and profile—As the U of L grows, attracts more high-quality students, instructors, and researchers, and increases its reputation, it will gain a higher profile.

Research, scholarship, and creativity—With more high-quality faculty there will likely be an increase in research, scholarship, and creative activity. Moreover, an expanded U of L may be more able to build further national and international research initiatives.

Enhancement of graduate studies—A growth in student population will result in more graduate students, urgently needed in Alberta and across Canada.

Community—As the U of L grows, so will its financial and cultural contribution to the community.

CHALLENGES

The University of Lethbridge continues to face challenges related to enrolment, unfunded students, competition, research growth, attraction and retention, space, and technology.

Enrolment Growth

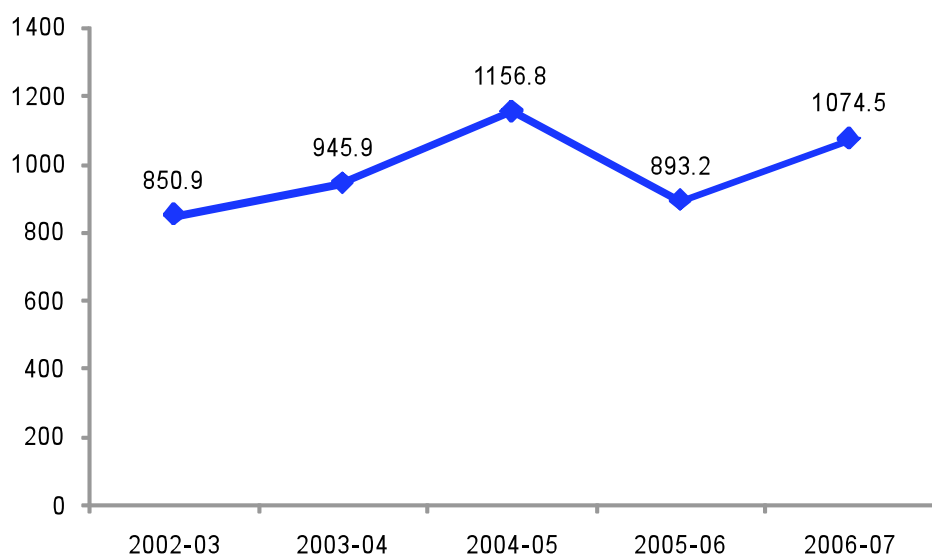
Over the past five years, enrolment has increased by about 15%. Enrolment growth presents four key challenges:

- (1) Finding additional instructional and office space.
- (2) Ensuring library resources are adequate.
- (3) Establishing administrative structures to support additional students.
- (4) Attracting faculty when teaching assignments may be higher than other institutions.

Unfunded Students

Our resources continue to be stretched by a growing number of unfunded students (Figure 1). These unfunded students pay a maximum of 30% towards their education, with no corresponding increase in grant revenue in the U of L's base operating budget.

Figure 1: Unfunded Student FLEs, 2002-03 to 2006-07



Increased Competition

There is increasing competition for students among post-secondary institutions in Canada, making it more of a challenge to maintain our market share. However, the U of L has several features that students value: smaller classes; a sense of community; more access to faculty and undergraduate research opportunities; national and international opportunities; state-of-the-art teaching space and laboratories; and access to cutting-edge computer technology. The U of L offers top quality programs and services, and we believe quality will prevail when it comes to attracting students.

Research Facilities and Indirect Costs

The U of L's continuing success in research funding and programs leads to an ongoing challenge to: (1) provide the office and laboratory space necessary to conduct new and expanded research programs; and (2) fund the indirect costs of such research.

Indirect research costs to the institution are an estimated 40¢ for each dollar spent on research. For a small institution, this is a significant drain on resources. The indirect costs funding from Industry Canada on federal research grants helps significantly, but the challenge persists.

Faculty Attraction & Retention

Attracting and retaining faculty members is an ongoing challenge. The specific challenges that the institution faces are threefold:

- (1) Hiring new faculty to meet emerging needs.
- (2) Retaining faculty who are still relatively early in their careers.
- (3) Retaining mid and late-career faculty with strong academic records, who are urgently needed to guide the development of junior faculty.

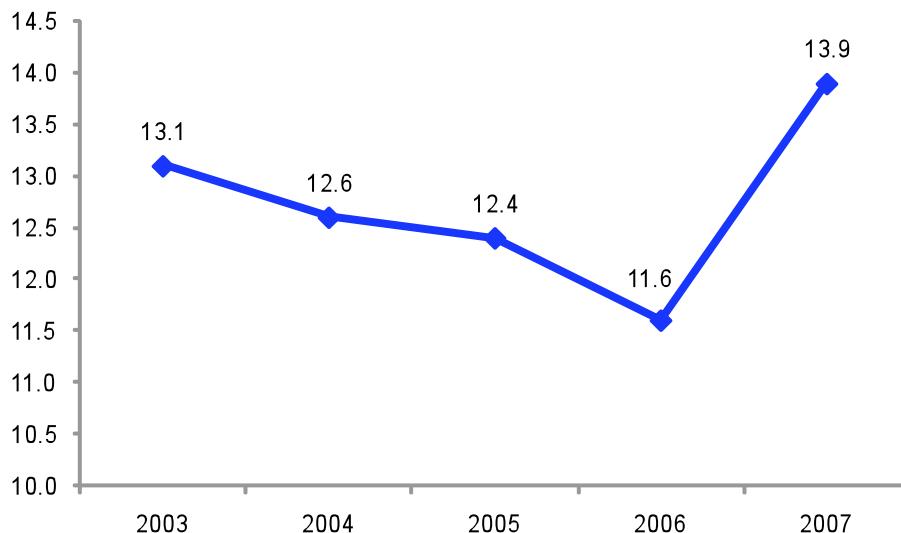
Applicable Technology

The U of L is progressive in providing technology to its students. A recent student survey showed that 85% of our students think access to computer technology on campus is exceptional. Our challenge will be to maintain this level of satisfaction, and to keep the U of L at the forefront of applicable technology. This can be difficult, in terms of both effort and cost.

Space

The U of L faces an acute, ongoing lack of space. The institution's net assignable space per undergraduate student FLE has been declining, with an increase in 2007 due to the opening of the 1st Choice Savings Centre for Sport and Wellness (Figure 2). With the projected opening of a newly constructed facility, Markin Hall (for Health Sciences and Management) in 2010, the additional space along with the capability to renovate the vacated space in University Hall by the Faculty of Management, hopefully some of the strain for new space will be alleviated.

Figure 2: Net Assignable Space per Undergraduate FLE (Sq.m. per FLE), 2003 to 2007



3.0 Goals and Performance Measures

3.1 GOALS

Goal 1: Accessibility

The University of Lethbridge will continue to provide access to quality academic programs for as many qualified students from the secondary school system and college transfer programs as it can accommodate, though the University's ability to do this is being greatly curtailed.

Strategy 1A: Continue to support appropriately funded, selective growth of the institution

Actions	Expected Results
Develop quality programs based on the capabilities of the University and the needs of students.	Enrolment targets will be met for all Access-funded programs at the University.
Continue to build relationships with high schools in primary target areas.	
Continue to build relationships with colleges.	The number of new transfer scholarships will expand.
Increase community visits to exchange information with stakeholders.	The number of community visits will rise.
Provide prospective students with clear evidence on the benefits of postsecondary education, and the specific advantages of attending The University of Lethbridge.	Enrolment targets will be met for all Access-funded programs at the University.

Strategy 1B: Improve our commitment to support First Nations education

Actions	Expected Results
Undertake research to identify actions that will increase the participation and success of First Nations students at the University.	The number of First Nations people attending and graduating from the University will grow substantially.
In collaboration with appropriate partners, the University will identify, develop, and seek funding for programs that meet the educational aspirations of First Nations people.	
Expand opportunities for all students to gain understanding of First Nations cultures and issues.	The number of non-Aboriginal students taking courses that deal with First Nations culture and issues will increase.
Encourage and support research to advance First Nations culture, improve the quality of life of First Nations peoples, and improve relationships between First Nations and other communities.	The University will expand the number of teachers, managers, and others with academic, cultural, and professional knowledge and skills related to First Nations culture.

Actions	Expected Results
Initiate programs of support for Aboriginal students.	Support services to First Nations students will improve and will focus more on improving recruitment and retention.

Strategy 1C: Enhance the process of internationalization on campus

Actions	Expected Results
Actively recruit in a limited number of international markets.	The U of L will continue to go beyond its minimum target of 7% international student enrolment.
Actively recruit international students who are currently in Canada in feeder schools and colleges.	
Continue with current international exchange programs, and explore new opportunities in this area.	A larger number of domestic and international students will have the opportunity to study abroad and come to campus.
Increase scholarships available for international students.	The number of undergraduate applications from overseas students and the percentage of offers accepted by these students will rise due to increased funding.
Improve local support for international students on-campus and in the community.	Retention rates of international students will improve.

Goal 2: Academic Excellence

The University of Lethbridge will retain and enhance its national reputation as an outstanding primarily undergraduate university. The U of L will continue to be a student-centered institution, committed to offering the best possible programs and services.

Strategy 2A: Continue to maintain academic programs of exceptional quality that meet the needs of students and the community

Actions	Expected Results
Continue to recruit and retain excellent faculty for new and existing academic programs.	The academic units will prepare staffing plans and hire top-quality academic staff for new and existing programs.
Systematically review programs and majors to ensure continuing quality.	Academic quality assurance processes will ensure the quality of units and programs.
Promote and sustain outstanding teaching through the Centre for the Advancement of Excellence in Teaching and Learning (CAETL).	CAETL will provide a program of teaching development to meet the needs of all University teachers and graduate students at all career stages.
Continue to offer student-professor interaction and small class sizes, particularly in upper-level courses.	High levels of student satisfaction with their educational experience.
Maintain the Board of Governors' Teaching Chair position for excellence in teaching.	
Combine innovative teaching and research methods with the effective use of emerging technologies to meet the educational goals of students.	
Continue to ensure students have access to the latest technology for academic purposes.	Continuous upgrade of the campus-wide network system, including wireless technologies, Internet-based video and videoconferencing services, and Internet-based voice services. The University will provide students and faculty with the most effective technology for academic purposes.
Conduct a number of surveys each year to monitor student satisfaction with the University's programs and services.	Continuous improvement of academic programs.
Partner with industry and other agencies to ensure that co-op, internship, and other experiential learning programs have sufficient capacity for all students who wish to participate.	All students who wish to participate in co-op, internships, and other experiential learning programs will have the opportunity to do so.

Strategy 2B: Create opportunities that prepare students for success in their personal lives and careers

Actions	Expected Results
Review programs in light of the emerging needs of Alberta and Canada, and the changing interests of students, to identify potential high priority programs.	The University will continue to offer degree programs in traditional academic areas and degree programs that address the career interests of students.
Continue to apply the University's principle of liberal education to all undergraduate programs.	Graduates will be prepared to tackle a wide range of challenges.
Combine innovative teaching and research methods with the effective use of emerging technologies to offer students a broad range of learning opportunities.	Graduates will have transferable, knowledge-based skills.
Systematically review programs and majors to ensure continuing quality.	Academic quality assurance processes will ensure the quality of units and programs.
Ensure that all students have access to career counselling services so they can make a successful transition to their careers.	Graduates will have the skills to transition successfully to their careers.

Goal 3: Research Excellence

The University of Lethbridge is committed to excellence in research for students and faculty. The U of L will develop a balanced funding approach and will increase research support in the social sciences and humanities.

Strategy 3A: Continue to build a strong research program, with nationally and internationally recognized researchers and scholars

Actions	Expected Results
Maintain and build on a vital and engaging intellectual climate that supports inquiry at all levels and permeates the instructional programs.	<p>The University's reputation for research will continue to grow.</p> <p>Undergraduate student involvement in research will increase.</p> <p>The number of students graduating from research-based graduate programs will double.</p>
Sustain and enhance the University's basic research program, including research supported by the national and provincial granting councils.	<p>The University's reputation for research will continue to grow.</p> <p>The amount of research activity at the University will rise.</p>
Develop centres of research excellence that span a wide range of disciplines.	The U of L will train more Highly Qualified Personnel.
Expand applied research based on existing and emerging areas of research excellence and with attention to regional and provincial needs. Disseminate this knowledge to the wider community through technology transfer.	
Maintain the quality and productivity of researchers.	
Build research partnerships with federal and provincial agencies, with the University of Calgary and University of Alberta, and with excellent institutions and research groups beyond Alberta.	
Provide adequate research space, equipment, access to information, and other necessary research infrastructure.	
Establish annual and regular internal funding to allow matching funds for external research grants.	
Establish the Prentice Institute for Global Population and Economy to focus on research and education in long-term economic and demographic trends.	
Maintain and develop the Board of Governors' Scholars program for faculty outside the physical sciences.	
Develop and implement a communications plan to raise public awareness of the quality and scope of research, scholarship, and creative activity at the University.	The University's reputation for research will continue to grow.

Actions	Expected Results
Promote the University's researchers and their research programs within government, industry, and the academic community.	The University's reputation for research will continue to grow.
Establish a fund to support short-term research assignments, to be awarded through peer reviewed competition.	The University's reputation for research will continue to grow. The amount of research activity at the University will increase.
Where appropriate, commercialize research to contribute to the national target of tripling commercialization by 2010.	Commercialization of research will increase selectively.
Continue to recruit and retain excellent faculty, and ensure they receive the necessary assistance to establish scholarly careers at the University.	The assignments of newly hired faculty will reflect their need to establish both their research and teaching careers.

Strategy 3B: Continue to provide research opportunities for undergraduate and graduate students

Actions	Expected Results
Aggressively pursue student research funding through NSERC, AHFMR, Alberta Ingenuity, and other agencies.	The University of Lethbridge will maintain and enhance its reputation as a national leader in undergraduate involvement in research, and will build its reputation at the graduate level.
Increase funds provided internally for the Chinnook Summer Research Awards.	
Develop and implement a competitive system of graduate teaching assistantships, graduate research fellowships, and graduate research assistantships.	The University of Lethbridge will approve and fund a consistent funding mechanism for students in research-based graduate studies.

Goal 4: Strengthen Community and Public Relations

The University of Lethbridge will continue to build and enhance a strong University presence in the local and provincial community.

Strategy 4A: Continue to build strong ties with the community

Actions	Expected Results
Establish a communications plan to regularize the University's consultation with the community.	Increased University-community integration and interaction.
Continue to build responsive, high quality degree programs that are well adapted to the needs of prospective students.	Increased financial support from the community in the form of donations for scholarships and capital projects.
Offer educational, recreational, and fine arts programs to the community.	Business leaders, scientists, and other members of the community will continue to serve on committees, and as sessional lecturers.
Continue presenting speaker events open to community members.	Enhanced positive reputation of the U of L in the community.
Through the Discovery Lecture Series and other series, continue to offer lectures of interest to the community.	
Continue to allow access to University facilities for recreational and cultural programs to community members.	
Continue to expand the University's web site as a key channel for marketing and community/student relations.	
Encourage faculty and staff involvement in the community and local service organizations.	
With the downtown University facility, develop and promote more community engagement with the University with public accessible events and programs.	
Continue to build partnerships in the community with the City of Lethbridge, other local governments, businesses, and government institutions.	
Maintain the broad representation from the community on the Senate.	
Use the Senate and its Outreach Committee to maintain and enhance connections with the community.	

Goal 5: Improve Student Services

The University of Lethbridge will identify the needs of students and employers when developing student services, and respond to student and community concerns and requirements whenever possible.

Strategy 5A: Provide students, faculty, and staff with exceptional access to information technology and resources

Actions	Expected Results
Continue to support high-speed network access for all students to data, voice, and video services.	Improved access to information. Better integration of technology to enhance learning in academic and research programs. Increased access to computers throughout the campus.
Develop an effective website for student registrations and course selection.	
Implement WestGrid, and participate in other information technology initiatives, such as Netera, SuperNet, and Canarie.	
Maintain excellence in our library system by moving selectively toward electronic-based library materials, preserving our current holdings, and adding appropriate print materials.	
Increase electronic access to scholarly journals through the National Site Licensing project and other initiatives.	

Strategy 5B: Continue to improve and update student services

Actions	Expected Results
Continue with surveys of students, from before entry to after graduation.	Improved satisfaction ratings on surveys. Improved services to current and prospective students. Improved efficiency. Improved retention and completion rates.
Develop and implement surveys of students to promote retention and student engagement.	
Provide one-time and continuing funds for initiating and maintaining new student services identified in student surveys.	
Implement the recruitment tracking and degree audit modules in the Student Information System.	
Continue to provide athletic services and recreation programs for students.	
Increase counselling and career planning resources for students by implementing an internship program with graduate students in Counselling Psychology.	
Increase support for students with disabilities, to allow them to fully participate in the U of L.	
Implement a wireless network on campus accessible for all students.	

Actions	Expected Results
Develop a web-based one-stop shop for all student services.	
Continue to provide health services to students, including health education and access to health professionals.	Improved satisfaction ratings on surveys. Improved services to current and prospective students. Improved efficiency. Improved retention and completion rates.
Ensure continued student access to recreational and cultural facilities.	

Strategy 5C: Extend access to services for students, faculty, staff, and the community, using emerging technologies where appropriate

Actions	Expected Results
Increase services supported by the Internet.	Automated support for front-line services in admissions, scholarship, student finance, and recruitment.
Implement web-based registration to increase the efficiency of student registration.	
Automate routine tasks, allowing staff to work directly with students on complex and unique student issues.	Improved efficiency. Improved levels of satisfaction with services.
In student computer labs and classrooms, continue to provide the most up-to-date technology available	
Improve remote access systems, including secure Virtual Private Networks.	Extend campus network securely to the home.

Goal 6: Facilities and Equipment Renewal

The University of Lethbridge will expand and upgrade academic, research, and support facilities to sustain enrolment growth. The U of L will address essential infrastructure and building renewal needs, based on available opportunities and resources.

Strategy 6A: Address the increased demand for postsecondary education by ensuring that the proper facilities, equipment, and infrastructure are available when required

Actions	Expected Results
Use the Campus Master Plan as the guide to future development of campus.	The University will identify ways to meet space requirements.
Annually identify and prioritize new building and building renewal projects, as part of the ten-year capital plan process.	The University will undertake capital campaigns to raise funds for new facilities.
Continue to work with Alberta Advanced Education and Technology and Alberta Infrastructure and Transportation to provide support for new and existing facilities, equipment, and infrastructure.	The University will have reserves to provide funds for replacing equipment and maintaining facilities.
Continue to prioritize and fund academic equipment renewal as part of the four-year capital budget process.	The University will continue to strive to bring the priority capital projects to fruition:
Continue to update the Facility Infrastructure Renewal Inventory and use it as a guideline to plan for annual infrastructure replacement for teaching support.	<ul style="list-style-type: none"> • Science complex. • Alberta Water and Environmental Sciences Building (phases 2 and 3). • Central Plant Facility. • Student Residences. • Art Gallery. • Office/Classroom Complex.
Continue to analyze life cycle costing of capital assets, and annually set up plans to fund asset replacements.	
Continue to provide the most up-to-date technology for students in laboratories and classrooms.	

Goal 7: Operate Responsively and Responsibly

The University of Lethbridge will operate in a manner that is fiscally responsible, forward thinking, and responsive to the needs of students, faculty, government, society, and the economy.

Strategy 7A: Increase tuition fees within the new Tuition Policy

Actions	Expected Results
Consult with students to achieve tuition fee rates that support quality academic programs.	The high quality of education at the University will continue.
Continue to work with Alberta Advanced Education and Technology to regularly review the Tuition Fee Policy and regulations, and make it more responsive to the needs of students and institutions.	The University's general operating budget (cash basis) will be balanced. Educational opportunities at the University will continue to be accessible.

Strategy 7B: Pursue funding from external sources

Actions	Expected Results
Develop partnerships with industry to provide contracted services that support academic programs.	The University's general operating budget (cash basis) will be balanced.
Continue with Board of Governors-approved four-year budgets, which approve the current year's budget and give approval in principle for the budget for the following three years.	
Meet the fundraising objectives set out in the University Advancement strategic plan.	University Advancement will develop relationships with individuals and organizations to advance the mission of the University.
Develop partnerships with industry to provide scholarships and bursaries for students.	

3.2 RELATIONSHIP OF UNIVERSITY OF LETHBRIDGE GOALS TO MINISTRY GOALS

U of L Goals	U of L Strategies	Related Government of Alberta Ministry Goals		
		<i>Advanced Education and Technology</i>	<i>Employment, Immigration and Industry</i>	<i>Alberta Government</i>
1. Accessibility	<p>A. Continue to support appropriately funded, selective growth of the institution.</p> <p>B. Improve our commitment to support First Nations education.</p> <p>C. Enhance the process of internationalization on campus.</p>	<p>Goal One: A learner-centred system accessible to all Albertans.</p> <p>Goal Two: Vibrant and sustainable learning communities and partnerships.</p> <p>Goal Three: A globally recognized quality advanced learning system.</p>	<p>Goal One: All Albertans share in and contribute to the economic prosperity of Alberta.</p>	<p>Goal One: Alberta will have a prosperous economy.</p> <p>Goal Nine: Alberta will have strong and effective municipalities and self-reliant Aboriginal communities.</p>
2. Academic Excellence	<p>A. Continue to maintain academic programs of exceptional quality that meet the needs of students and the community.</p> <p>B. Create diverse opportunities that prepare students for success in their personal lives and careers.</p>	<p>Goal One: A learner-centred system accessible to all Albertans.</p> <p>Goal Two: Vibrant and sustainable learning communities and partnerships.</p> <p>Goal Three: A globally recognized quality advanced learning system.</p>	<p>Goal One: All Albertans share in and contribute to the economic prosperity of Alberta.</p>	<p>Goal One: Alberta will have a prosperous economy.</p> <p>Goal Two: Albertans will be well prepared for lifelong learning.</p>
3. Research Excellence	<p>A. Continue to build a strong research program, with nationally and internationally recognized researchers and scholars.</p> <p>B. Continue to provide research opportunities for our undergraduate and graduate students.</p>	<p>Goal One: A learner-centred system accessible to all Albertans.</p> <p>Goal Three: A globally recognized quality advanced learning system.</p> <p>Goal Four: Build research and innovation capacity in key areas.</p> <p>Goal Five: Capturing value through innovation.</p>	<p>Goal One: All Albertans share in and contribute to the economic prosperity of Alberta.</p>	<p>Goal One: Alberta will have a prosperous economy.</p> <p>Goal Two: Albertans will be well prepared for lifelong learning.</p>

U of L Goals	U of L Strategies	Related Government of Alberta Ministry Goals		
		<i>Advanced Education and Technology</i>	<i>Employment, Immigration and Industry</i>	<i>Alberta Government</i>
4. Community and Public Relations	A. Continue to build strong ties with the community.	Goal Two: Vibrant and sustainable learning communities and partnerships.		Goal Eight: Albertans will have the opportunity to enjoy the province's natural, historical and cultural resources.
5. Student Services	A. Provide students, faculty, and staff with exceptional access to information technology and resources. B. Identify and update services required by students. C. Extend access to services for students, faculty, staff, and community, using emerging technologies where appropriate.	Goal One: A learner-centred system accessible to all Albertans. Goal Two: Vibrant and sustainable learning communities and partnerships.		Goal Two: Albertans will be well prepared for lifelong learning.
6. Facilities and Equipment Renewal	A. Address the increased demand for postsecondary education by ensuring that the proper facilities, equipment, and infrastructure are available when required.	Goal One: A learner-centred system accessible to all Albertans. Goal Three: A globally recognized quality advanced learning system. Goal Four: Build research and innovation capacity in key areas.		
7. Operate Responsively and Responsibly	A. Increase tuition fees to the Alberta average. B. Pursue funding from external sources.	Goal One: A learner-centred system accessible to all Albertans. Goal Four: Build research and innovation capacity in key areas.		

3.3 PERFORMANCE MEASURES

The University of Lethbridge uses eight performance measures to assess progress related to the institution's goals, strategies, and expected outcomes:

- **Enrolment**—The total number of students enrolled at The University of Lethbridge.
- **Graduate Satisfaction**—In conjunction with other Alberta universities and university colleges, we conduct surveys of graduates, which include rating how satisfied graduates are with the education they received at The University of Lethbridge. We will use these data to assess our progress related to the Academic Excellence and Student Services goals.
- **Graduate Participation and Employment Rates**—This performance measure tracks how well U of L graduates fare in the workforce. Data will show the participation rate and employment rate of graduates. The participation rate is the proportion of graduates who are active in the workforce. The employment rate shows the proportion of these active participants that are currently employed. These data will be useful in measuring the success of its strategies and actions under the Academic Excellence and Research Excellence goals.
- **Administration Expenditures**—Administration expenditures as a percentage of total expenditures less ancillary expenditures will be a useful measure of the efficiency of The University of Lethbridge administration.
- **Research Intensity**—The value of sponsored research divided by the value of provincial operating grants.
- **Research Impact**—This measure shows how well the University attracts research money from community and industry sources. Research impact is calculated by dividing the value of community and industry sponsored research by the value of total sponsored research.
- **Research Council Grants**—This performance measure tracks the grant monies that The University of Lethbridge receives from the Natural Sciences and Engineering Research Council (NSERC), Social Sciences and Humanities Research Council (SSHRC), and Canadian Institute of Health Research (CIHR).

Annual reports show data that track progress for each performance measure.

4.0 Budget Information

4.1 BUDGET OVERVIEW

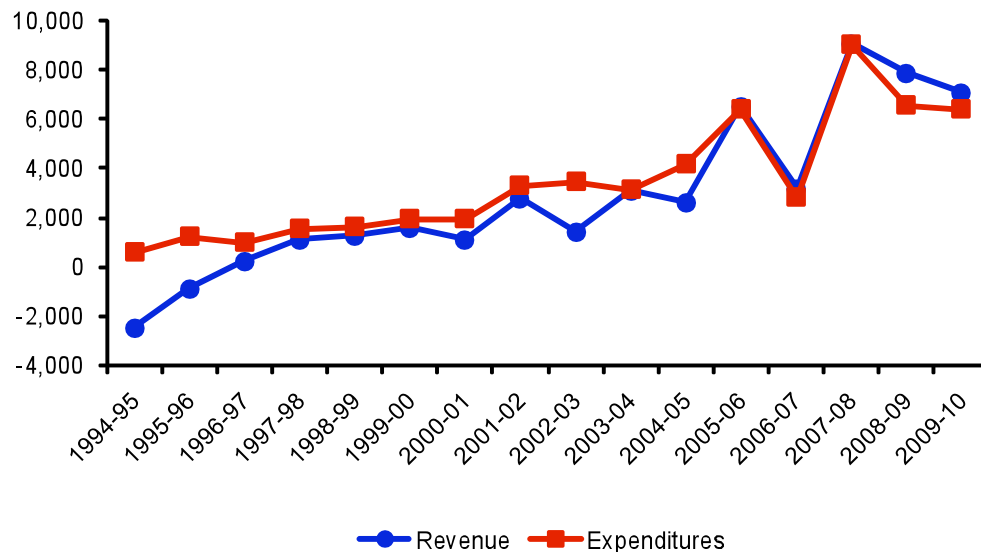
The University of Lethbridge is presenting a balanced general operating budget for the 2008-09 fiscal year, with a budget of \$144.9 million. The budget is an increase of \$11.8 million (9.3%) over the previous year. As in previous years, decisions were made within the context of the University's current strategic planning document and the issues identified in the proposed strategic plan for the next five-year period.

The institution has not faced reductions for the past three years. This has allowed the institution to regroup and commit to projects that have provided the institution with more efficiency in operations, addressed priorities within the institution and provided resources in areas that align with the University's strategic plan. This document continues to address these issues. Reductions may be required in 2010-11 and 2011-12 using conservative budget assumptions.

Through the budget process, the University and the University Budget Committee (UBC) follow certain principles that guide the process each year and set the decision making process. These principles include:

- An open budget process that allows for discussion between all units on campus.
- A process, which allows resources to be aligned with institutional priorities.
- A process that examines the long-term consequences of short-term decisions.
- A process that concentrates on the long-term financial viability of the University.
- A process that ensures the financial stability and growth of the institution.

Figure 3: Annual \$ Changes in General Operating Revenue and Expenditures, 1994-95 to 2009-10 (\$000)



4.2 KEY BUDGET ASSUMPTIONS

In the past we have had to react to the financial crisis of reduced operating grants with the focus on maintaining quality and trying to balance the budget each year. With the institution not having to make reductions in recent years, UBC has been able to provide funds to units to better accommodate workload and issues and provide for losses in purchasing power due to inflationary increases. Ensuring student academic programs and services at the undergraduate and graduate levels are properly funded, dealing with issues around the attraction and retention of students and addressing the internal infrastructure issues have been the focus of this four-year budget. The recommendations detailed later in this report build on the concepts of providing a quality education, quality support services, and a research base that will allow the institution to grow and maintain many of the qualities we are known for.

We have modeled the operating budget for the next four years using several assumptions, many of which have been described above. In making these assumptions, UBC has taken a conservative approach to ensure that any changes to these assumptions will still allow for sufficient resources to provide for a balanced budget. The assumptions are provided in Table 1 below.

Table 1: Key Assumptions for General Operating Budget Projections, 2008-09 to 2011-12

	2008-09	2009-10	2010-11	2011-12
Revenue				
Grant increase	6.0%	6.0%	3.0%	3.0%
Instructional fee increase	4.6%	3.0%	3.0%	3.0%
Govt. tuition fee subsidy	2.7%	-	-	-
Expenditures				
Compensation				
Merit	3.25 to 4.0%	Approx. 3.5%	Approx. 3.5%	Approx. 3.5%
Market	Pool est.	Pool est.	Pool est.	Pool est.
Benefits	5.0%	5.0%	5.0%	5.0%
Contracts	11%	9.9%	9.0%	8.3%
Utilities	-12.5%	0%	0%	0%
Insurance	15.8%	7.3%	6.8%	6.3%
Library Acquisitions	1.4%	1.4%	1.4%	1.4%

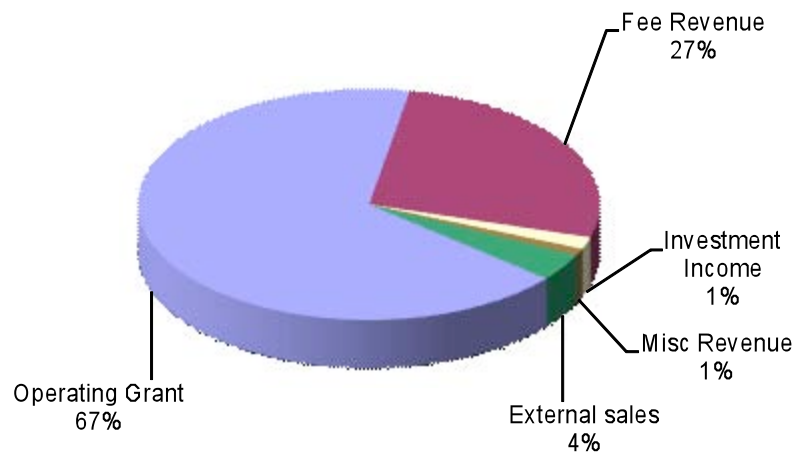
4.3 PROPOSED REVENUE BUDGET

The University's overall general fund revenue budget will increase by \$11.8 million in 2008-09. The proposed revenue estimates are realistic and attainable, although there is little room for unexpected revenue swings apart from minor fluctuations, especially in tuition revenue. Past experience, however, shows that the budget projections have tracked very closely with realized revenue.

The Government grant provided by Alberta Advanced Education and Technology has provided an increase of 6% in the past two years and in 2008-09 and 2009-10. The Government has not however provided us with information concerning increases past 2009-10 so we have estimated increases for the last two years of the budget. We have not had any Access programs roll into the base-operating budget in the current year; however we anticipate that the second phase of New Media in the Faculty of Fine Arts will roll into base in 2008-09. The University was provided with an Access Program in 2007-08 in the School of Health Sciences. The expansion of the Nursing Program with Lethbridge College will see 20 additional students in 2010-11. The total increase in Government grants in the coming year is \$7,972,875.

Figure 4 shows general operating revenue by source. The graph depicts general operating funds only; it does not include capital, research, special purpose, endowments, or ancillary operations.

Figure 4: General Operating Revenue by Source, 2008-09



Grants

The single largest revenue item for the University is government grants, totaling \$90,129,095. This represents an increase of \$7,972,875 in continuing support, the majority of which is a 6.0% increase in the general operating grant and access grants over last year to reflect general cost pressures. Alberta Advanced Education and Technology has not announced details of any other additional grants, continuing or one-time, and therefore no other increases have been built into the budget for the coming years. Details of grants are in Table 2.

Table 2: Grant Details

- General operations grant increase of 6% (\$4,707,075) has been provided for in the budget for 2008-09
- Access grant increases relating to increases in targeted growth in the programs (\$1,943,800)
- Access operations grant increase of 6% for 2007-08 (\$607,600)
- Tuition rebate adjustment to reflect actual rebates received from the government (\$714,400)
- Performance Envelope funding is now provided on a one-time basis and is dependent on the availability of government funds. Data from each institution is provided to Alberta Advanced Education and Technology by December 31 with allocations possibly made prior to March 31.

Instructional Fees

Fees represent the second largest component of the University's general operating fund revenue budget. For the fiscal year 2008-09, the University projects approximately \$36.4 million in fee revenue from all credit and non-credit instructional programs, and from the remaining non-mandatory student related fees. This is an increase of \$904,800 or 2.6% over the 2007-08 fiscal year. This increase consists of the tuition fee increase and credit hour increases within each of the academic units. About ninety percent (91.3%) of tuition and materials and services fees for undergraduate students go directly to the academic units to offset expenditures related to teaching. Table 3 shows current and projected revenue from tuition and related fees.

The Board of Governors formally approved the new fee rates for the 2008-09 fiscal year at the December 2007 meeting. Alberta Advanced Education and Technology introduced a new tuition policy for the 2007 year which rolled back tuition fees to the 2004-05 level and restricts fee increases to the annual average Alberta CPI (using a twelve month period ending in June each year). The rate that has been used for the 2008-09 increases is 4.6%.

The increase in instructional fee revenue provided in the budget is attributed to both increases in fee rates as well as to planned enrolment changes in each of the faculties/schools. This increased enrolment is general growth and does not reflect increases funded through the Access Programs.

Table 3: Current and Projected Tuition and Related Fee Revenues, 2007-08 to 2011-12

Year	Fee Revenue
2007-08	\$35,492,700
2008-09	\$36,397,500
2009-10	\$37,402,600
2010-11	\$38,294,400
2011-12	\$39,175,400

Table 4: Current and Proposed Per Course Instructional Tuition Fees, 2007-08 to 2011-12

	Actual 2007-08	% Increase	Proposed 2008-09	% Increase	Proposed 2009-10	% Increase	Proposed 2010-11	% Increase	Proposed 2011-12
Undergrad									
Canadian	438	4.6%	458	3.0%	472	3.0%	486	3.0%	500
Foreign	992	4.6%	1037	3.0%	1,068	3.0%	1100	3.0%	1,130
Graduate									
Canadian	515	4.6%	538	3.0%	554	3.0%	570	3.0%	587
Foreign	1,147	4.6%	1,200	3.0%	1,236	3.0%	1,273	3.0%	1,311
M.Ed. Term Fees									
Part-time	989	4.6%	1034	3.0%	1,065	3.0%	1,097	3.0%	1,130
Full-time	1,483	4.6%	1,551	3.0%	1,598	3.0%	1,646	3.0%	1,695
Master of Counseling									
Program fee	482	4.6%	504	3.0%	519	3.0%	535	3.0%	551
Course fee	1,056	4.6%	1,105	3.0%	1,138	3.0%	1,172	3.0%	1,207

Note: International students in the M.Ed. and Master of Counseling Programs are assessed tuition fees at a rate of an additional 125% than that of Canadian Students.

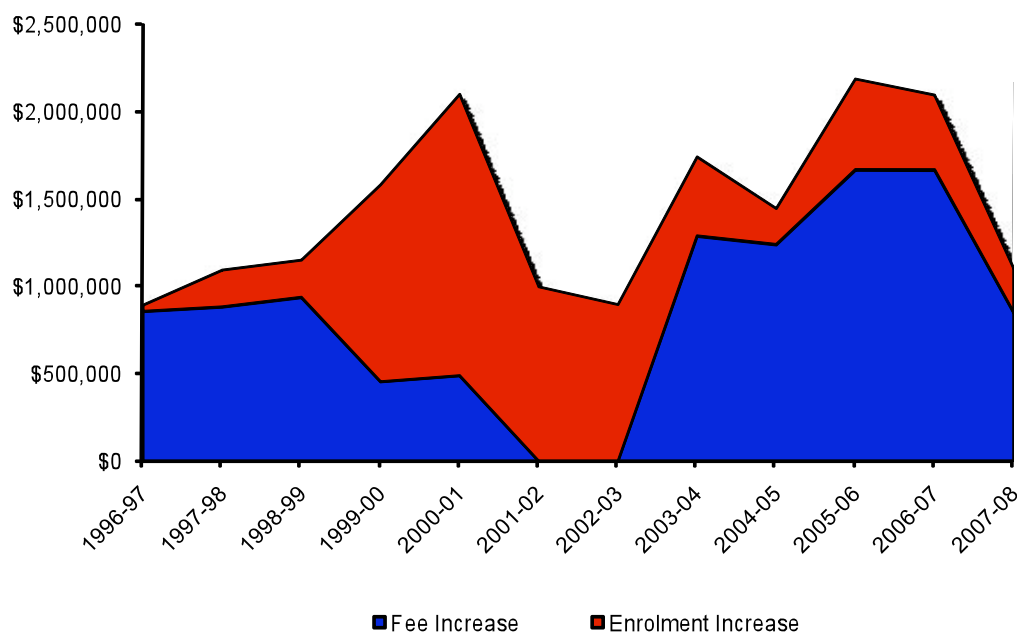
Table 5 shows the growth in credit hours, excluding Access funded programs, that each Faculty and School has planned for the next four years to meet their budget requirements.

Table 5: Credit Hours by Faculty or School, 2006-07 to 2011-12

	Actual 2006-07	Estimated 2007-08	Proposed 2008-09	Proposed 2009-10	Proposed 2010-11	Proposed 2011-12
Arts and Science	104,839	104,469	105,514	106,569	107,635	108,711
Education	13,700	13,988	14,211	14,457	14,616	14,703
Management	37,167	35,583	36,052	34,970	33,921	32,904
Fine Arts	21,018	21,212	19,967	19,967	19,967	19,967
Health Sciences	4,626	7,826	8,650	9,611	9,347	9,347
Total	181,350	183,078	184,394	185,574	185,486	185,632

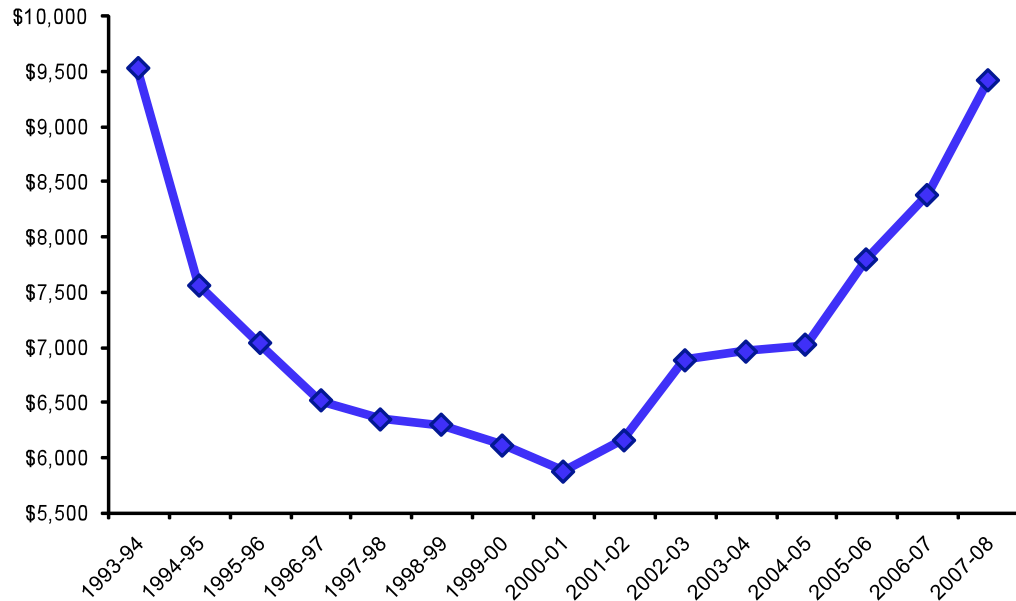
Figure 5 shows the increased revenue provided from instructional fees for the past eleven years and the portions that are attributed to fee increases and enrolment growth. Between 2001-02 and 2005-06, the entire increase in fees was attributed to enrolment growth, with fees being frozen at the 2000-01 levels.

Figure 5: Proportions of Instructional Fee Revenue due to Enrolment Increase and Fee Increase, 1996-97 to 2007-08



Although there has been a steady increase in the operating grant, the grant per student decreased steadily until 2002 when Alberta Advanced Education and Technology began to provide unfunded enrolment grants to compensate the universities for the increased access provided to students. Although these grants did not fund the entire cost of students attending the institution, it did provide some relief. Figure 6 shows the base operating grant per full-time student (in absolute dollars, not adjusted for inflation).

Figure 6: Change in General Operating Grant Per Full-Time Student, 1993-94 to 2007-08

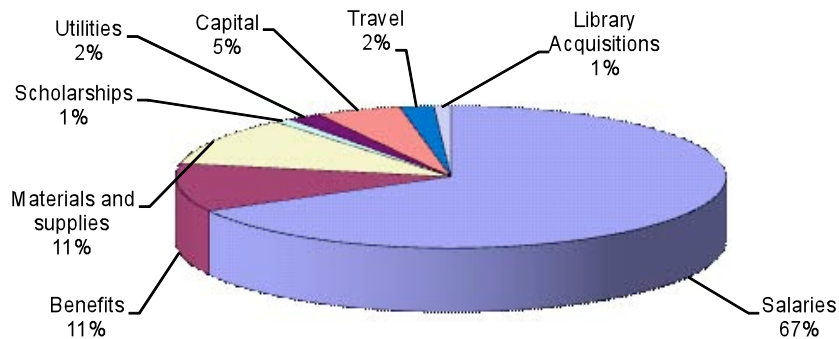


4.4 PROPOSED EXPENDITURE BUDGET

The University is again in a position where our expenditure line items have not outpaced the growth in our revenues. This is primarily due to more funds being provided through the provincial and federal governments, increases in instructional and other fees and continuing government funds previously being used to fund capital projects being freed up for other uses.

The following graph illustrates the University's expenditure budget by object of expenditure. The most notable component of the budget is salaries and benefits, which make up close to 80% of the total budget (cash basis – excluding amortization).

Figure 7: Expenditures (Cash Basis), 2007-08



As in previous years, the starting point for the 2008-09 operating budget is the projection of the continuing cost base from the 2007-08 year. Projected expenditures remain at prior year levels unless increases are required through contractual or statutory obligations. UBC recognizes that this method of budgeting has had consequences for many budget units, including a loss of purchasing power due to inflationary increases and the absorption of costs as enrolment increases. UBC has tried in prior years, through selective reductions, to provide some relief. We have made an effort this year in the continuing allocations to provide for increases where required for general operations to alleviate some of the pressures we have not been able to address over the years due to budgetary constraints.

Each year contractual or statutory increases including salaries and benefits, utilities, insurance, software contracts/ maintenance costs, and inflationary increase for library acquisitions are adjusted for automatically in the budget process. These costs are not discretionary and must be paid, and are therefore fully funded on an annual basis.

Compensation Costs

The largest component of the University of Lethbridge's expenditure budget is compensation costs, which comprise almost 80% of the total (cash basis – excluding amortization). Attracting and retaining faculty and staff remains a Board of Governors' priority.

The University is in the first year of a three-year agreement with the University of Lethbridge Faculty Association (ULFA). The Alberta Union of Provincial Employees (AUPE) contract will be renegotiated this year. Exempt Support Staff and Administrative Professional Officers compensation rates are reviewed and set annually. We have used the rates set in the contracts and have estimated increases in years where the contracts are to be renegotiated.

The remaining increase in benefits results from increases in the salary and wage base, which ultimately affects the various fringe benefit budgets.

Fixed Costs

While quite modest this year, fixed costs continue to grow and represent a factor in the development of this year's operating budget. Like compensation cost increases, these increases must be taken off the top of any available new funds to cover the projected cost increases and provide for basic operating needs of a fixed or semi-fixed nature.

There are several noteworthy increases and decreases within the fixed cost category:

- (1) Utility costs will show a decrease in the current year and no changes for the subsequent 3 years of the budget. The University has signed fixed rate contracts for both electricity and gas and any consumption over the contract amount is bought on the free market. The decrease in utilities is net of predicted increases in sewer and water.
- (2) Insurance rates have again increased in the past year, by approximately 14% over the previous year. It is anticipated that the University will continue to experience rate increases around 6% in the subsequent three years.
- (3) There are anticipated increases in our software contracts of \$50,000 per year for the next four years.
- (4) UBC has also included an adjustment to the library acquisitions budget equal to the inflationary index anticipated for each year.

Faculty Budgets

As with all post-secondary institutions, it is important that the University of Lethbridge remain focused on maintaining both our quality teaching requirements and our strong research programs. UBC will address a number of issues that will strengthen our commitment to both teaching and research.

The UBC has tried to address a number of issues that will strengthen the U of L's commitment to both teaching and research.

Teaching

In the past few years, several faculties have seen a decrease or leveling off of credit hours. This has led to operating deficits that have been covered through the use of carry forward funds. It is anticipated that in the next few years there will be no major growth within the institution which would have allowed for higher revenue and a stabilization of the faculty budgets. Instead, with compensation costs comprising 90% of many of the faculty's budgets and rising faster than the base revenue, units will be facing deficits. In the budget presentations in December 2007, the area of greatest concern identified by the academic units was the budget shortfalls in the coming years due to increased compensation costs and stabilized tuition revenue.

In 2008-09, UBC will be allocating \$675,000 to the academic units on a continuing basis to alleviate some of the cost pressures. This will be done through the removal of the taxes on the academic units for the replacement of computers in the student labs (\$4 to \$6 per course) and support to the Curriculum Re-Development Centre (CRDC) (\$1 per credit hour). The following table shows how funds will flow to each of the academic units.

	Student Labs	CRDC	Additional Grant	Total
Arts & Science	211,025	105,515	3,460	320,000
Education	28,420	14,210	62,370	105,000
Fine Arts	39,935	19,965	25,100	85,000
Management	34,050	36,530	49,420	120,000
Health Science	17,300	8,650	19,050	45,000
Total	330,730	184,870	159,400	675,000

The University received an Access Grant in 2005-06 for the expansion of the MA/MSc/PhD programs. This expansion will see the program expand from 64 funded (Full Load Equivalents) FLE students, excluding a PhD program, to 294 funded FLEs including a PhD program of 60 FLEs.

Last year, UBC allocated to the Faculties/Schools \$2000 per graduate FLE to recognize the teaching and supervision of these students and scholarships in the amount of \$150,000 annually was approved. In 2008-09, an additional \$300,000 will be provided to Arts and Science specifically to support faculty members teaching in graduate programs. The Faculty of Arts and Science will work with the School of Graduate Studies to structure programs to meet the teaching requirements. An additional \$150,000 will be provided for graduate scholarships and a recruitment officer focusing on the recruitment of graduate students will be hired.

Research

The University of Lethbridge recognizes the importance of a strong research base and has a mandate to do research in the areas in which it offers instruction, and to do applied research in areas of special relevance to the region. A strong commitment to research and involving graduate and undergraduate students in research is one of the institution's main strengths. To ensure it remains an institutional strength, UBC is proposing four initiatives:

- (1) \$250,000 will be provided as start-up funds and \$150,000 will be provided on a continuing basis to fund the required matching for the Canadian Foundation for Innovation (CFI) research program. These funds will be distributed by a committee who will be responsible for the vetting and prioritizing of research proposals.

- (2) \$150,000 will be provided on a continuing basis to fund research in the non-physical science areas of the institution including Fine Arts, Management, Education and the Social Sciences and Humanities. These funds will be distributed annually based on the number of faculty in each of these areas.
- (3) Funding will be provided to Information Technology for a position to support research computing (cyber infrastructure).
- (4) Funding from the Quality Initiative Program (QIP) will be provided to fund 15 additional awards in the area of social sciences and humanities at \$5,625 for four months. In addition, top up funds for the existing awards will be increased from \$4,000 for three months to \$5,625 for four months.

4.5 CONSOLIDATED BUDGET

(Figures are in thousands of dollars.)

	General Operating	Ancillary Enterprises	Restricted Funds	2008-09 TOTAL Approved Budget	2009-10 Proposed Budget	2010-11 Proposed Budget	2011-12 Proposed Budget
REVENUE							
Government and other grants	\$ 90,129	\$ -	\$ 13,128	\$ 103,257	\$ 109,452	\$ 113,830	\$ 118,383
Tuition and related fees	36,398	-	-	36,398	37,403	38,294	39,175
Sales of services and products	5,643	9,580	-	15,223	15,984	16,784	17,623
Gifts and donations	62	-	1,395	1,457	2,500	2,500	2,500
Investment income	5,000	232	200	5,432	5,000	5,000	5,000
Miscellaneous	1,131	-	88	1,219	1,225	1,225	1,225
Amortization of deferred capital contributions	6,500	-	-	6,500	6,630	6,763	6,898
	144,863	9,812	14,811	169,486	178,194	184,396	190,804
EXPENSE							
Salaries and benefits	106,405	2,458	7,400	116,263	123,529	131,249	139,453
Supplies and services	9,186	1,352	3,125	13,663	13,663	13,663	13,663
Repairs and maintenance	678	182	230	1,090	1,090	1,090	1,090
Cost of goods sold	196	3,528	-	3,724	3,798	3,874	3,952
Travel	2,503	41	685	3,229	3,293	3,359	3,426
External contracted services	1,594	500	355	2,449	2,498	2,548	2,599
Utilities	2,311	523	1	2,835	2,891	2,949	3,008
Scholarships, fellowships and bursaries	1,356	-	795	2,151	2,194	2,238	2,283
Professional fees	571	32	20	623	636	649	662
Interest on long term liabilities	875	125	-	1,000	1,020	1,020	1,020
Property taxes	13	208	-	221	225	229	234
Insurance	621	20	-	641	681	721	761
Equipment	2,931	466	2,200	5,597	4,000	4,080	4,162
Provisions	3,125	-	-	3,125	3,187	3,251	3,316
Amortization of capital assets	12,500	199	-	12,699	12,953	13,212	13,476
	144,863	9,635	14,811	169,310	175,658	184,131	193,104
EXCESS OF REVENUE OVER EXPENSE	\$ -	\$ 177	\$ -	\$ 177	\$ 2,536	\$ 265	\$ (2,300)

4.6 STATEMENT OF CASH FLOWS

(Figures are in thousands of dollars.)

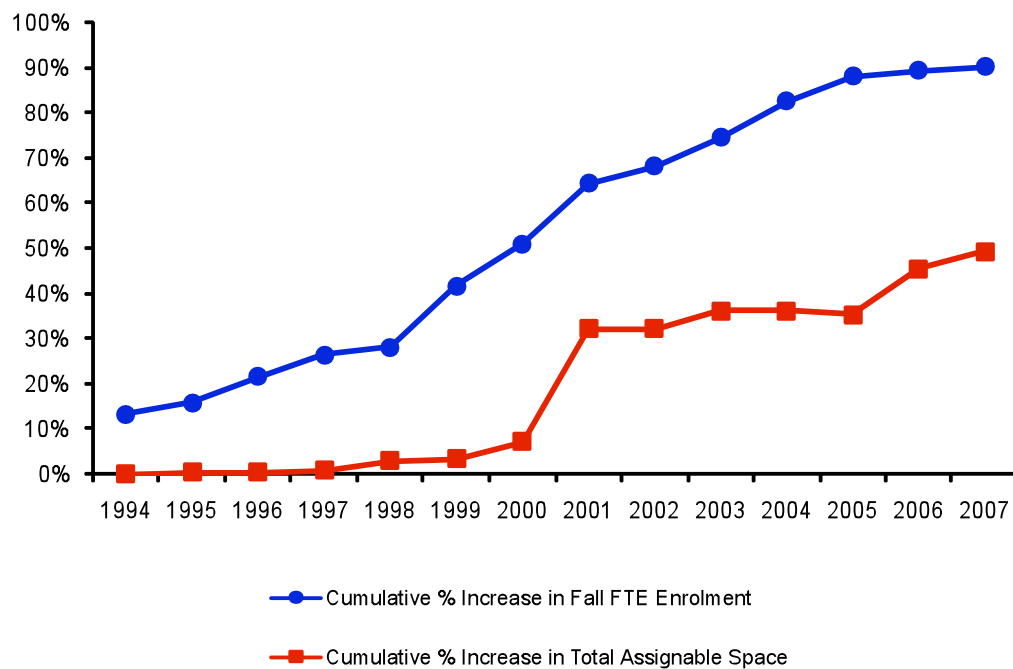
	2006-07 Actual	2007-08 Approved Budget	2008-09 Approved Budget	2009-10 Proposed Budget	2010-11 Proposed Budget	2011-12 Proposed Budget
CASH PROVIDED BY (USED IN) OPERATING ACTIVITIES:						
Excess of revenues over expenses	\$ 15,830	\$ 13,182	\$ 177	\$ 2,536	\$ 265	\$ (2,300)
Non-cash transactions						
Amortization of unamortized deferred capital contributions	(6,271)	(7,000)	(6,500)	(6,630)	(6,763)	(6,898)
Amortization of capital assets	12,305	12,142	12,699	12,953	13,212	13,476
Loss on disposal of capital assets	(49)	-	-	-	-	-
Unrealized gain on investments	-	(10,000)	-	-	-	-
Increase in long-term employee benefit liabilities	175	500	200	200	200	200
	21,990	8,824	6,576	9,059	6,914	4,478
Increase in non-cash working capital	4,144	2,500	2,500	2,500	2,500	2,500
	26,134	11,324	9,076	11,559	9,414	6,978
CASH PROVIDED BY (USED IN) INVESTING ACTIVITIES:						
Purchase of investments (net)	(16,076)	(20,000)	(3,000)	(3,000)	(3,000)	(3,000)
Capital asset additions						
Internally funded	(18,736)	(7,725)	(14,310)	(5,210)	(12,610)	(2,610)
Externally funded	(14,784)	(69,952)	(74,853)	(98,271)	(129,500)	(125,500)
Collection additions	(38)	(200)	(200)	(200)	(200)	(200)
Increase (decrease) in long-term receivable	(3,358)	-	253	243	234	224
Increase in asset retirement obligation	1,085	-	-	-	-	-
Proceeds on disposal of capital assets	185	-	-	-	-	-
	(51,722)	(97,877)	(92,110)	(106,438)	(145,076)	(131,086)
CASH PROVIDED BY (USED IN) FINANCING ACTIVITIES:						
Capital contributions	22,858	69,952	74,853	98,271	129,500	125,500
Endowment contributions	8,825	460	460	500	500	500
Capitalized investment earnings	477	300	300	300	300	300
Long term debt repayments	(122)	(475)	(137)	(146)	(154)	(164)
	32,038	70,237	75,476	98,925	130,146	126,136
INCREASE (DECREASE) IN CASH	6,450	(16,316)	(7,558)	4,046	(5,516)	2,028
CASH AND SHORT-TERM INVESTMENTS, beginning of year	28,528	18,213	34,978	27,420	31,466	25,950
CASH AND SHORT-TERM INVESTMENTS, end of year	\$ 34,978	\$ 1,897	\$ 27,420	\$ 31,466	\$ 25,950	\$ 27,978

5.0 Capital Projections

5.1 SPACE TRENDS

Fall full-time enrolments have increased steadily at the U of L, almost doubling over the last 15 years from 4,244 Fall FTE's in 1993 to 8,069 Fall FTE's in 2007. Unfortunately, the amount of assignable space on campus has not grown at the same rate (Figure 8).

Figure 8: Cumulative Percentage Increase in Fall FTE Enrolment and Total Assignable Space, 1994 to 2007 (using 1993 as the base year)



The net result of the University's inability to keep pace with its growing number of full-time enrolments (FTEs) is that over the last 15 years the assignable space per fall full-time enrolment has decreased by 3.3m². Space concerns are being felt across the institution as all faculties/schools continue to search for more effective ways of using existing space. The renovation and optimization of existing facilities has been our ongoing strategy, but the returns for such a strategy are rapidly diminishing. Existing facilities are operating at maximum capacity. To address the current enrolment pressures, new facilities must be built.

The University is looking forward to 2010 when there will be a significant increase in space on campus due to the scheduled completion of the new Markin Hall (for Health Sciences and Management). The completion of the new Alberta Water and Environmental Science Building in summer 2008 will also provide more space in University Hall as a result of 11 principal investigators moving into the new facility.

The ongoing space crunch at the University is apparent in all aspects of its operation, as shown in Figure 9 (below). Demand for office space is so acute that faculty members often share offices or are encouraged to work from home. In a University that prides itself on its service and availability to students this situation is unacceptable.

Figure 9: Total Assignable Space (m²) per Fall FTE Enrolment, 1993-94 to 2007-08

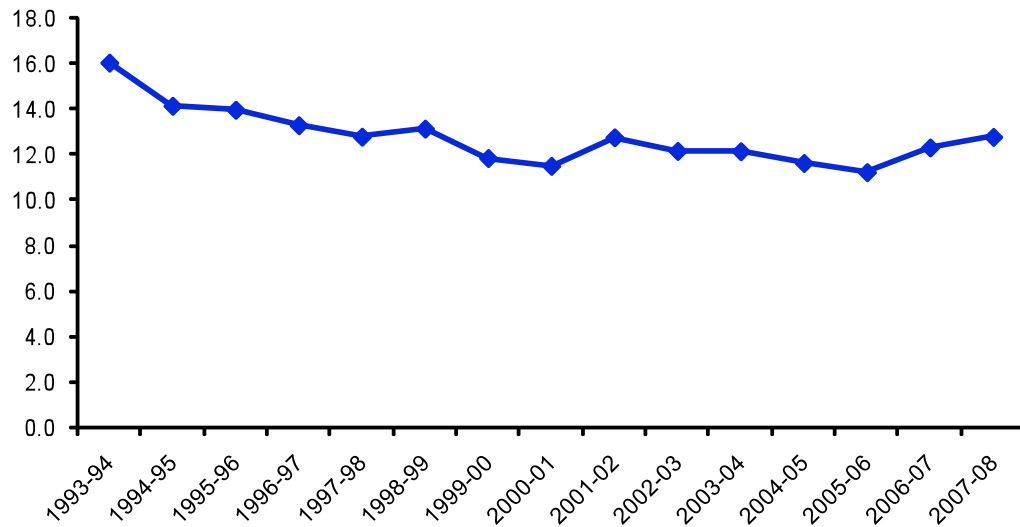
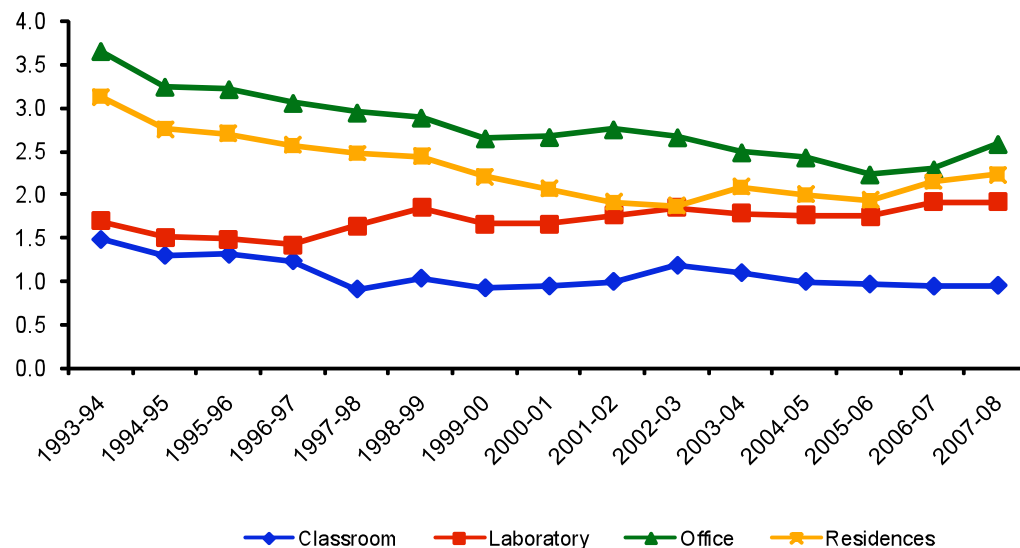


Figure 10: Assignable Space by Category (m²) per Fall FTE Enrolment, 1993-94 to 2007-08



From 1993-94 to 2007-08, the institution's Fall enrolment has grown from 4,244 Fall FTE's in 1993 to 8,069 Fall FTE's in 2007-08, an increase of 90%. During this same period, the assignable space on campus has increased by approximately 49%, but the assignable space per Fall full-time student has decreased by 21% due to the dramatic increase in enrolment. Space pressures at the University of Lethbridge are very acute, especially when compared to other residential Alberta universities (Figure 11 and Figure 12).

Figure 11: Gross Area by Type (m²) per Fall Head Count for the Alberta Residential Universities, (taken from the 2005-06 APPA Facilities Performance Indicators Report)

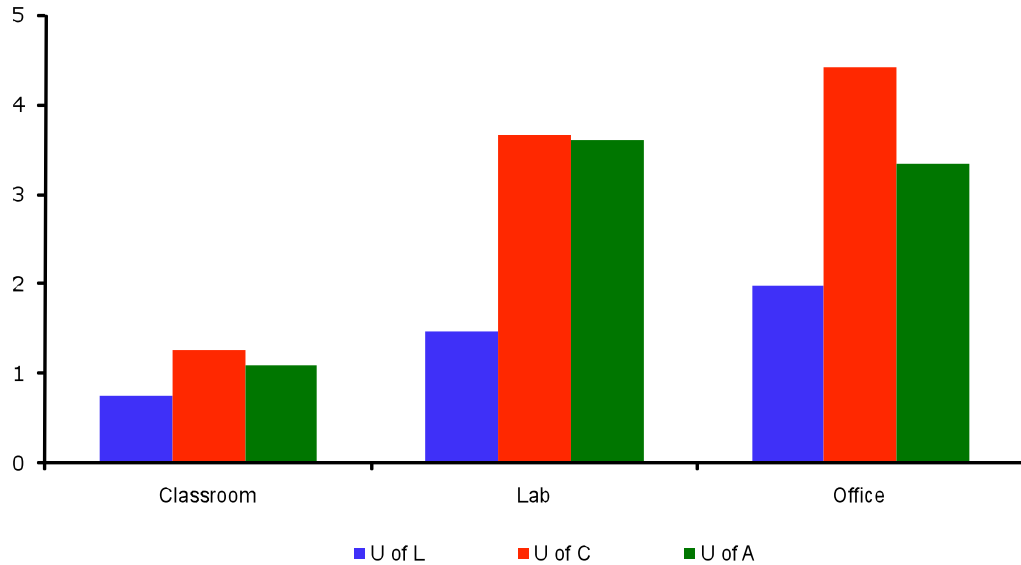
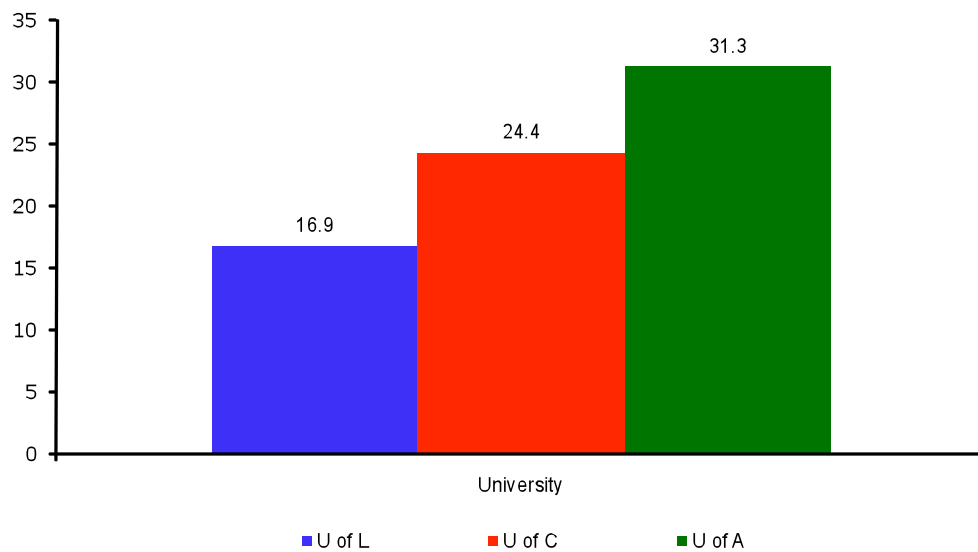


Figure 12: Total Gross Area (m²) per Fall Head Count for the Alberta Residential Universities. (taken from the 2005-06 APPA Facilities Performance Indicators Report)

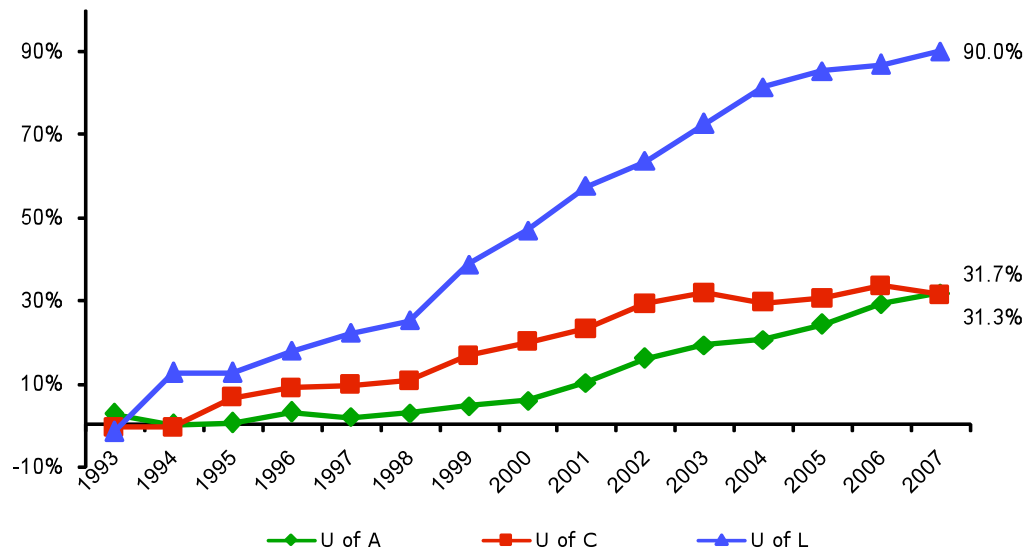


With many U of L spaces having already been renovated, the creation of new buildings is the only feasible solution to maintain the U of L's competitive position within Alberta's post-secondary environment.

5.2 CAMPUS SIZE

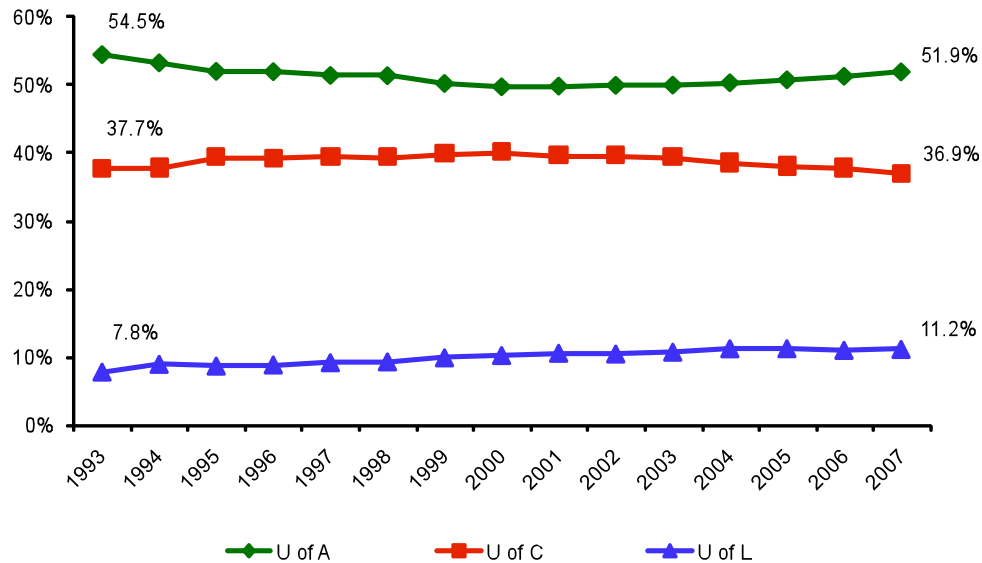
Enrolment growth at the University of Lethbridge has greatly outpaced that at both the University of Alberta (U of A) and the University of Calgary (U of C) (Figure 13).

Figure 13: Cumulative Percentage Increase in Fall Enrolment, 1993 to 2007



More compelling is the growth in Fall full-time enrolment as a percentage of all residential Alberta universities (Figure 14). The U of L's market share has risen by 2.2%, whereas the U of C's contribution has remained unchanged and the U of A's has decreased over the same period.

Figure 14: Fall Enrolment as a Percentage of all Alberta Residential Universities, 1993 to 2007



5.3 RESEARCH CAPACITY

To continue to excel in research, the U of L requires new facilities that provide dedicated space for research activities. These facilities would allow for more collaboration with other Alberta-based institutions, allow the U of L to competitively attract and retain academic staff, and would increase the capacity for training by providing space for principal investigators, graduate and undergraduate students. A good example of what competitive research space can do is the explosion of research activities, funding and opportunities following the addition of the Canadian Centre for Behavioural Neuroscience.

Although the U of L has renovated University Hall to accommodate the growing needs of the institution to the best of its ability, converting office and classroom space in University Hall to accommodate research space needs is generally more costly than new construction for research space. There is also a concern with the appropriateness of having significant research activities in the same building that accommodates offices, classrooms, and student residences.

The Alberta Water and Environmental Science building, which is currently in the construction stage, will help to provide space for University water researchers upon the completion of phase 1 in summer 2008. However additional research spaces are still in need throughout the campus for faculty across all disciplines. The U of L continues to try to provide faculty with much needed research space to the best of its current funding and space constraints.

5.4 RENEWAL AND UPGRADING

The institution's first priorities in renewal and upgrading funding are addressing health and safety, energy conservation, and life cycle cost issues.

Deferred Maintenance

The Deferred Maintenance Study, produced by the Canadian Association of University Business Officers in 2000, warned that postsecondary institutions in Canada have a serious problem with the poor conditions of their facilities. Subsequent studies have shown that the situation has not significantly improved since 2000.

The 2006 figure for the University of Lethbridge's deferred maintenance is about \$77 million. An Alberta Infrastructure and Transportation facilities study found that, taking into account the building envelopes, the Facilities Condition Index (FCI) is now about 29%. A high FCI means that buildings are deteriorating faster than the institution can obtain funding to maintain them.

Ideally, funding for facilities maintenance should be 2% of the building replacement costs, which for the U of L is about \$5 million per year. For the last two years, actual funding for facilities maintenance through the regular Infrastructure Maintenance Program (IMP) has been approximately \$1.8 million per year, which is 0.7% of building replacement costs for government supported facilities. As mentioned previously, the Provincial Government recognized the need to fund deferred maintenance projects at the University and contributed \$25.9 million in one-time funds to address immediate deferred maintenance health and safety projects.

The U of L is working closely with Alberta Infrastructure and Transportation to ensure the facilities condition database is up to date, to support the planned renewal and upgrading of facilities in a cost effective manner.

Although the U of L has been fiscally responsible in ensuring that funds are available in the future to maintain our physical facilities, it has put pressure on our operating budget, as funds that should have been used for teaching are diverted to facilities maintenance. Operating budget needs and projections will not allow the reallocation of operating budget dollars to be set aside for capital projects in the foreseeable future as all operating funds will be required to maintain the quality of our academic programs.

Infrastructure Upgrades

When new buildings are required on campus, it will be necessary to upgrade the services that support these buildings. The current central power plant in University Hall will be able to service the new Alberta Water and Environmental Building and Markin Hall, but a new power plant is required to accommodate any further new facilities on campus or auxiliary services will have to accompany new construction projects. The Campus Master Plan calls for developing a second energy centre as new facilities are being constructed.

5.5 LONG-TERM PROJECTS

For the past several years the University of Lethbridge has taken steps to develop its strategic plan, including planning for physical growth. The purpose of this plan is to prepare for the requirements of the institution based on the current and anticipated growth in enrolment.

The University of Lethbridge has identified the following long-term projects as priorities. Each project may be funded from different sources, as a particular project might be more suitable for government funding, whereas others are more likely to be funded by users or private donors. And all are critical to the future development of the U of L.

Alberta Water and Environmental Sciences Building

(Phase 1 construction in progress.)

The U of L was selected as the administrative centre for the tri-University water research partnership with the University of Alberta and the University of Calgary. The University requires this new facility to fulfill its commitments in relation to this water research partnership. Phase 1 of the facility is in construction, with projected completion in August 2008. This facility is situated in Exploration Place, near the Canadian Centre for Behavioral Neuroscience facility.

The building will accommodate an interdisciplinary group of faculty members, together with a complement of research associates, including graduate and undergraduate students and Post-Doctoral Fellows. The Alberta Water and Environmental Sciences Building (AWESB) will also allow the U of L to fulfill its research commitment under the Water Institute for Semi-arid Ecosystems (WISE), in which the university has a founding role. The building project has been categorized into three distinct construction phases based upon programmatic needs. Phase 1 will be completed in Summer 2008 and will accommodate 11 principal investigators, along with their research assistants and support staff. Phases 2 & 3 will be constructed when funding has been obtained and will likely

accommodate researchers from external research agencies and industry partners, who will collaborate with U of L researchers.

Alberta Infrastructure and Transportation announced that it is contributing \$22.5 million towards phase 1 of this project. The total project cost is an estimated \$42.86 million (Phase 1 \$26.75 million, Phase 2 \$7.15 million, and Phase 3 \$8.96 million).

Water resources are of great importance to our community, and the U of L is committed to strengthening this area of research.

Markin Hall

(Construction in progress.)

The University of Lethbridge's School of Health Sciences and Faculty of Management are growing at an exceptional rate, resulting in an immediate need for new accommodations. Alberta Infrastructure and Transportation announced that it will contribute \$50 million towards the project, which is in the construction-tendering phase. Markin Hall will consist of 9,637m², at a projected construction cost of \$65 million (in December 2007 dollars).

This project is a component of the ongoing expansion of the University campus in accordance with the core Campus Expansion Plan adopted in 2001. This new facility will address the needs—both educational and functional—of Health Sciences and Management to the year 2021, allowing an increased number of graduates to enter the Alberta work force. The facility will also allow the Faculty of Management to move out of outdated and marginal space in University Hall and into more appropriate and updated space that will enable them to better deliver their instructional programs and complete research.

Sports Stadium Project

(Construction in progress.)

A joint project with the City of Lethbridge, this sports facility will include a synthetic track, two outside playing fields, team rooms, 2000-seat grandstand, plus applicable site services. The University's existing track and field are in very poor shape, with major repairs required, and its current location is the same site for the proposed Markin Hall, so its functions must be moved in the near future.

The City of Lethbridge is contributing \$3.7 million towards the funding for the \$11.3 million project budget, with the University providing the balance of the funding, including external donations expected. The University of Lethbridge will be responsible for managing, programming, and operating the facility, which may be operational in Summer 2008. The project is anticipated to be completed by the fall 2008.

Penny Building

The University is the beneficiary of a building located in downtown Lethbridge. The University intends to offer services and programs in this facility that provides more engagement with the community and offers a more convenient location for community partners to participate in University activities and programs. There will not be core academic teaching in this facility.

The U of L has applied for grant funding to accommodate a Community Wellness Centre in the Penny Building. This centre will have the primary focus of providing service learning opportunities and will be available for students from a range of disciplines and professional programs. Downtown community members will have the opportunity for increased access to health and counseling services (e.g. Aboriginal women's fitness assessment, culturally adapted prenatal education). The intent of this centre is to make resources and programs available to people who might not otherwise be able to access them, due to issues such as poverty, lack of transportation and mental health challenges.

The cost of renovating the space to accommodate the University's needs is estimated at \$4.7 million.

Physical Education Building Upgrades

The majority of the existing Physical Education Building was renovated during the construction of the newly completed 1st Choice Savings Centre for Sport and Wellness in 2005 to 2007 but there are still significant areas in the building that need to be upgraded and renovated to meet the University's academic and programming needs. The estimated cost for completion of the Physical Education Building upgrades is \$5.0 million.

University Hall/Anderson Hall Renovations

Once Markin Hall is completed in 2010, the Faculty of Management, currently located in University Hall, and the School of Health Sciences, currently located in Anderson Hall, will be moving into the new facility. This will necessitate the University reviewing the current building programs of the vacated space and determine what needs to be in place to accommodate the space needs of the institution. A review of the space needs is currently taking place. It is estimated that renovations/upgrades in these vacated spaces could cost \$7.4 million.

Science Complex

The University continues its strong commitment to research but the lack of available research space is of great concern. The University recently commissioned external consultants to review the adequacy of our research space on campus, in particular in University Hall. The Diamond Schmitt Architects Safety and Pedagogy Study, February 28, 2007 and the RWDI Consulting Engineers & Scientists study Exhaust Dispersion Assessment, November 16, 2007 of the University Hall Science Instructional and Research Laboratory space revealed that the research space on campus is woefully inadequate to meet its current and future needs and recommended a separate research building to be constructed on campus at a likely cost of \$180 million.

The review noted that renovating space in University Hall by converting existing office and classroom space to accommodate research space needs is not an acceptable solution. The renovation would be more costly than new construction for research space. Furthermore, there are concerns with having the research space in University Hall, which has been renovated beyond its original programming requirements, and also health and safety issues with including research space in a building that accommodates student residences, offices, and classrooms.

To continue to excel in research, the U of L requires new facilities that will provide more dedicated space for research activities. These facilities would allow for more collaboration with other Alberta based institutions, and would increase the capacity for training by providing space for principal investigators, new graduate and undergraduate students, and technical support personnel.

The University will develop a plan to address the research needs and the health and safety concerns and a determination of the type of space needed for future expansion on campus.

Central Plant Facility

As mentioned previously, the University's existing central plant facility has the capacity to handle the new Alberta Science and Environmental Science Building, Markin Hall and the Sports Stadium but any additional new future facilities will require the addition of another central plant facility to accommodate their utility needs. The estimated cost of this facility is \$24.0 million.

Student Residences

Research shows that students who live on-campus generally achieve better academic results, have more involvement with student activities, and have a more fulfilling academic experience. With this in mind, the University wishes to increase its residence spaces from only 8% of its current Lethbridge campus student population to at least 20%.

Art Gallery

The U of L art collection is recognized as one of the finest in Canada, with over 14,000 works of art. In building the collection, the U of L committed to making the collection accessible for teaching and research, a collection that is a valued resource for art galleries and researchers across Canada and around the world.

The University of Lethbridge is in need of an art gallery to display its outstanding art collection and allow adequate access to this collection by students and the community. Though the current storage facility is high quality, it cannot house the full current collection, and the collection continues to grow.

A proposed art gallery addition would include exhibition space, curatorial support space, storage, and a loading area. The storage space must conform to exacting standards so the U of L can meet its responsibility for stewardship of this national resource.

A larger, more accessible exhibition space will make the collection available to a wider public through exhibitions and public programs, provide the U of L's Museum Studies students with experience for careers in the cultural sector, and also allow more access to students in this field of study.

Office/Classroom Complex

It is expected that over the next 10 years the U of L will require the addition of another office/classroom complex in order to meet the facility demands of the student population and associated faculty offices and research space.

Table 6: Priority Capital Projects, 2008 to 2012

2008-2012 PRIORITY CAPITAL PROJECTS

	Estimated Project Cost
Category I: Renewal/Preservation Projects	
1 Penny Building (downtown)	4,700,000
2 Physical Education Building Upgrades	5,000,000
3 University Hall Renovations - vacated Faculty of Management space	5,835,600
4 Anderson Hall Renovations - vacated Health Sciences space	1,574,700
Total Renewal/Preservation Projects	\$ 17,110,300
Category II: Expansion/Replacement Projects	
1 Alberta Water & Environmental Sciences Building - Phase 2	7,150,000
2 Alberta Water & Environmental Sciences Building - Phase 3	8,960,000
Total Expansion/Replacement Projects	\$ 16,110,000
Category III & IV: New Facilities & Capital Planning	
1 Science Complex*	180,000,000
2 Central Plant Facility	24,000,000
3 Student Residences	10,600,000
4 Art Gallery	60,000,000
5 Office/Classroom Complex	60,000,000
Total New Facilities & Capital Planning	\$ 334,600,000
TOTAL PRIORITY CAPITAL PROJECTS	\$ 367,820,300
Projects in Progress	
1 Markin Hall (for Health Sciences & Management)	65,000,000
2 Alberta Water & Environmental Sciences Building - Phase 1	26,750,000
3 Deferred Maintenance	18,415,000
4 Sports Stadium	8,250,000
Total Projects in Progress	\$ 118,415,000

* Science Complex includes a remote sensing institute and an agricultural biotechnology laboratory.

Note - Estimated Project Costs are in current dollars (December 2007) and will be adjusted depending on construction start dates.

5.6 EFFECTS OF CAPITAL PLANS

Program Expansions

The U of L continues its commitment to meeting the challenge of increased postsecondary demand on the provincial system. The institution is operating at capacity and proposed capital projects will accommodate current and future planned expansion.

To plan effectively and efficiently, the U of L selects program changes that share infrastructure and expertise as much as possible. The program expansions build on existing programs, which minimizes program development costs and shares infrastructure. Even where additional infrastructure is needed, the expertise gained from the existing programs will help to contain costs. For example, in information technology programs, the University's state-of-the-art network and computer laboratories provide an effective shared resource.

Demand for Effective Technology

All new instructional space will have an appropriate level of technology, including network access and multimedia instructional capacity. This will support the U of L's goal of remaining a leader in the effective use of technology in learning and research.

The demand for increased technology in the classrooms, labs, and administration puts additional pressures on the U of L's resources. To remain a leader in the use of technology, the U of L has a unique and cost-effective approach to replacing computers for teaching and administration functions.

The academic equipment replacement reserve project supports a scheduled replacement of existing teaching equipment in the faculties/schools. This allows the faculties and schools to ensure equipment and technology is up-to-date. The reserve is being funded by a total annual allocation of \$1 million from the University's operating budget.

Life-Cycle Costs

When planning the expansion of its facilities, the University ensures life-cycle costs of its facilities are minimized. Energy efficiency and ease of maintenance are integral to building planning.

Energy Efficiency

All new capital facilities and new renovations will take into consideration the Leadership in Energy and Environmental Design (LEED) specifications. The University believes this is socially responsible and it achieves the added benefit of lower operating costs for the life of the building. The new Markin Hall and the AWESB are being constructed to achieve a LEED Silver certification. The 1st Choice Savings Centre for Sport and Wellness was also built to this certification.

Library Resources

The issue of limited library resources continues to be of concern for the U of L. The University struggles with the need to commit more dollars to improving the library collection in all disciplines, trying to keep pace with inflation, copyright issues and anticipating the issue of digital resources and what affect this will have on curriculum needs now and into the future.

5.7 CAPITAL BUDGET

Figures are in thousands of dollars.

	2008-09 Approved Budget	2009-10 Proposed Budget	2010-11 Proposed Budget	2011-12 Proposed Budget	2012-13 Proposed Budget
SOURCES OF FUNDS					
Major Capital Projects:					
Fund Raising/External Sources	3,500	10,000	10,000	-	-
Provincial Government	88,750	80,871	121,000	117,000	36,000
Research Agencies	250	-	-	-	-
University Contributions	11,950	2,600	-	-	-
	82,450	93,471	131,000	117,000	36,000
Infrastructure Maintenance (IMP) Grant					
Indirect Research Costs Grant	1,369	1,400	1,400	1,400	1,400
Alberta Infrastructure & Transportation	300	300	300	300	300
University contributions	2,434	6,700	7,600	6,800	800
University Capital Reserve	680	680	680	680	680
	1,930	1,930	1,930	1,930	1,930
TOTAL FUNDING	\$ 89,163	\$ 103,481	\$ 142,810	\$ 128,110	\$ 41,110
CAPITAL EXPENDITURES					
Major Capital Projects:					
Marlin Hall	31,400	32,000	-	-	-
Alberta Water & Environmental Sciences Bldg - Phase 1	21,260	-	-	-	-
Sports Stadium	7,460	-	-	-	-
• Science Complex	-	40,000	100,000	40,000	-
• Central Plant Facility	-	-	9,000	15,000	-
• Student Residences	8,000	2,800	-	-	-
• Art Gallery	-	-	15,000	30,000	15,000
• Office/Classroom Complex	-	-	7,000	32,000	21,000
• Alberta Water & Environmental Sciences Bldg - Phase 2	7,150	-	-	-	-
• Alberta Water & Environmental Sciences Bldg - Phase 3	-	8,960	-	-	-
• Penny Building (Downtown)	4,700	-	-	-	-
• Physical Education Building upgrades	2,500	2,500	-	-	-
• University Hall - vacated Management space	-	5,836	-	-	-
• Anderson Hall - vacated Health Sciences space	-	1,675	-	-	-
	82,460	93,471	131,000	117,000	36,000
Capital Maintenance & Facility Upgrade (includes deferred maintenance)	4,103	7,400	8,600	8,600	2,500
Equipment					
Arts and Science	700	700	700	700	700
Education	100	100	100	100	100
Management	70	70	70	70	70
Fine Arts	200	200	200	200	200
Health Sciences	25	25	25	25	25
Administrative Support Units	150	150	150	150	150
Sports and Recreation/Athletics	150	150	150	150	150
Motor Vehicles	35	35	35	35	35
Information Technology & Telecommunications	500	500	500	500	500
	1,930	1,930	1,930	1,930	1,930
Ancillaries					
Parking	300	300	300	300	300
Bookstore	30	30	30	30	30
Printing	60	60	60	60	60
Housing	230	230	230	230	230
Catering and Food Services	60	60	60	60	60
Conference Services	10	10	10	10	10
Ancillary Services Director	10	10	10	10	10
	680	680	680	680	680
TOTAL CAPITAL EXPENDITURES	\$ 89,163	\$ 103,481	\$ 142,110	\$ 128,110	\$ 41,110

* Note - Board of Governors has not formally approved these major capital projects. They have been submitted to Alberta Advanced Education as the University's Capital Priorities.

6.0 Enrolment Plan

The University of Lethbridge has a strong tradition of providing access to a university education for Albertans and other Canadians. The University is committed to providing increased access if the financial resources are available. Table 7 shows the planned program expansions for the next five years.

Table 7: Summary of Program Expansion, 2007-08 to 2011-12

GROUP	FLES	BY	FISCAL	YEAR	
	2007-08	2008-09	2009-10	2010-11	2011-12
Arts and Science					
Bachelor of Arts	75	100	100	100	100
First Nations Transitions Program	24	24	24	24	24
Management					
Bachelor of Management	121	160	160	160	160
Bachelor of Management – other faculties	22	29	29	29	29
Fine Arts					
New Media	100	100	100	100	100
Health Sciences					
Bachelor of Nursing (NESA)	35	70	70	70	70
Bachelor of Nursing (NESA 2)	-	-	10	20	20
Graduate Studies					
Master of Science (Management)	20	20	20	20	20
Master of Arts	40	40	40	40	40
Master of Science	130	130	130	130	130
Doctor of Philosophy	30	45	60	60	60

Appendix One: The University of Lethbridge Strategic Plan, 2003-08

OUR MISSION

The University of Lethbridge exists to develop individuals who are creative and inventive discoverers, leaders and independent learners, well prepared to contribute significantly to their local, national, and global communities. We, The University of Lethbridge, care about what our students, staff, and faculty need to achieve this goal. Thus, we provide excellent programs with a liberal education focus, outstanding and inspirational teaching, intellectual horizons that extend far beyond the boundaries of our community, quality services, an inclusive and diverse campus within a climate of respect, high quality facilities and resources, and a commitment to responsible action.

The University also has a social responsibility to protect free inquiry and scholarship, and to push the frontiers of current knowledge through innovative research. Taking this responsibility seriously, we cultivate a community that fosters intellectual exchange, creativity, originality, and discovery.

OUR VISION

The University of Lethbridge strives to build the most vital and engaging learning environment in Canada, through superior teaching, research, and creative achievement.

OUR FUNDAMENTAL PRINCIPLES

Preamble

The University of Lethbridge operates under the guidance of the Board of Governors, and is subject to the provisions of the *Post-Secondary Learning Act*. The General Faculties Council and the councils of the faculties and schools determine the University's academic programs and priorities. The University relies on a framework of policy and strategy, constructed through collegial processes, to set priorities and conduct operations promptly and responsively. Administrative services are provided by a highly qualified professional staff.

The fundamental principles of The University of Lethbridge reflect its commitment to students; to society; to creativity, inquiry, and discovery; and to responsible action.

The Principles

OUR COMMITMENT TO SOCIETY

We protect free inquiry and expression. In keeping with the unique mandate of the university in society, The University of Lethbridge supports and protects artistic expression and the free and open scholarly discussion of issues, including those that are controversial. We also have an obligation to address long-term issues and those of broad scope.

We work for the public good. As a public institution, The University of Lethbridge promotes and provides degree-level education for the public good. As a university, we promote scholarship, research, and creativity at the highest level and quality, including research of particular relevance to the region, and we share the benefits of that learning with the community. The University bases its decisions about programs, standards, and capacity on the best available evidence. Within that context, we use innovative methods and processes to optimize the openness of the institution to qualified students.

We are connected with the community. The University publicizes its research, scholarship, creative activities, and other initiatives that have significance for society. Members of the University contribute to the community based on their professional expertise. To these ends, the University develops relationships with organizations and individuals, and shares its facilities and resources for

the good of the community. We acknowledge faculty, staff, students, and alumni for initiative and creativity that leads to the increased involvement of the University in the community.

The University of Lethbridge values its close and mutually supportive relationship with its alumni, who exemplify the benefits of the University and communicate its value locally, provincially, nationally, and globally.

We believe in diversity, and equal opportunity for participation. Diversity strengthens the University and enriches the experience of our students, staff, and faculty members. We respect, appreciate, and encourage diversity, and provide equal opportunity for full participation in the University. We are an inclusive community, in which students, staff, and faculty members feel welcome, respected, valued, and empowered to contribute fully.

We are dedicated to removing barriers to full participation wherever possible. The University facilitates accessibility by all students, staff, and faculty members to the intellectual, physical, and social aspects of the institution.

We believe in gender equity. The University of Lethbridge honours the rights of all and treats people with dignity and respect. We acknowledge the similarities and differences among women and men, and seek to remove all barriers that inhibit an individual's aspirations and potential. The University will create a supportive environment through education and communication. Equity is inclusive.

We encourage and support the participation of First Nations peoples in all aspects of the University community. The University of Lethbridge values its relationship with First Nations peoples, and collaborates widely to develop programs that are relevant and available to them. We work with First Nations peoples to ensure that these partnerships, and the resulting programs, continue to meet all students' needs.

We are environmentally and socially responsible. When making decisions about the design and operation of The University of Lethbridge, we act ethically and responsibly, considering environmental sustainability and good citizenship.

OUR COMMITMENT TO STUDENTS

We are student-centred. Students give focus and meaning to The University of Lethbridge. The University helps students achieve their full potential by facilitating their intellectual growth and academic and personal excellence. To this end, the University maintains high academic standards and excellent programs, supported by high-quality, responsive services.

The University of Lethbridge supports and encourages the growth of the student as a whole person, in an atmosphere based on equality of treatment, freedom from discrimination, and responsible use of authority.

We inspire. The University of Lethbridge aspires to inspirational teaching that ignites intellectual passion and stimulates a thirst for knowledge. We value and support many approaches to teaching and learning, in a variety of settings within the University and in the broader community.

We believe in excellence in undergraduate education. The University of Lethbridge treasures its reputation for quality, responsiveness, and innovation at the undergraduate level. We will continue to sustain and enhance our reputation as an outstanding undergraduate institution. Recognizing that our capacity is constrained by resources, we preserve our value for students and society by managing our size, and concentrating on fields that reflect the excellence of faculty members and the interests of students and society.

We believe graduate programs are essential. Graduate programs, closely integrated with undergraduate and research programs, are fundamental to the mission of The University of Lethbridge. Because graduate programs are highly specialized in their focus and requirements, the University implements them selectively. Through them, we contribute to the personal, intellectual, and professional development of individuals, and help meet society's need for citizens with the highest levels of professional and intellectual achievement. In offering graduate programs, the University uses creative approaches appropriate to the disciplines.

We believe education is a journey, not a destination. A true measure of our success is our alumni's continuing interest in a lifetime of learning, and their commitment to this goal. Although The University of Lethbridge focuses on degree programs, we offer courses for students who wish to

pursue lifelong learning. We are open to alliances or partnerships to provide quality programs that are approved and recommended by professional associations and other organizations.

We promote face-to-face learning. Teaching at The University of Lethbridge takes place primarily on our Lethbridge campus and our satellite campuses in Calgary and Edmonton, reflecting our belief that people learn best when they work together in the same place at the same time. We use information technology to supplement this form of instruction. The University delivers courses at a distance when appropriate for the program and the students.

We expand horizons. A global perspective is essential to The University of Lethbridge in its teaching, learning, and research. The University educates its students to become well-rounded citizens of a complex society, capable of making important contributions in Canada and elsewhere in the world.

The University of Lethbridge invites students and faculty members from around the world to participate in learning at the University, and provides international opportunities for our students and faculty members to experience other cultures.

We give students the best preparation for their future. The University of Lethbridge provides students with a liberal education—a solid foundation for personal and professional growth. Liberal education promotes the development of academic skills that students can apply to a wide range of experiences, and a broad base of knowledge in the human, aesthetic, ethical, scientific and organizational disciplines. It encourages a multi-faceted, reflective approach to the complex challenges of the 21st century.

OUR COMMITMENT TO CREATIVITY, INQUIRY, AND DISCOVERY

We encourage and support research, scholarship, and creative work. The University of Lethbridge stimulates and supports research, scholarship, and creative work in all areas in which we teach, and in areas of special relevance to the region and province. This link between research and teaching allows us to explore what is known, challenge how it is known, and thus influence the nature of teaching. We value and protect an environment of free inquiry in which to conduct research, scholarship, and creative work, and communicate the results of these activities with others. We encourage student involvement in research, scholarship, and creative activity.

We conduct basic and applied research in many forms. Research conducted at The University of Lethbridge is both basic and applied. Basic research includes that with the broadest scope and longest term. The University has a responsibility to analyze and reflect on these matters, and to communicate the outcome of these efforts. The University also concerns itself with applied research, particularly that which affects the well being of our community. Given the range of disciplines involved, research at the University takes many forms.

OUR COMMITMENT TO RESPONSIBLE ACTION

We advance the interests of The University of Lethbridge. The University of Lethbridge communicates with its internal and external communities so that its mission, goals, and work are well understood. We engage our alumni and other supporters in the activities of the University. We build the value of the University to society by developing mutually supportive relationships with governments, individuals, and organizations.

We are active and innovative in recruitment and retention. In developing a coordinated institutional approach to the recruitment and retention of excellent faculty members and staff, The University of Lethbridge pursues new and innovative ideas, implements the most effective strategies, and monitors their success.

We practice sound financial and resource management. The University of Lethbridge maintains exemplary financial management of our public and private funds, through the sound management of our budgeting and planning processes, and the preservation of our human and physical assets. The University allocates resources efficiently and effectively, consistent with the institution's principles and values.

We use technology effectively. The University of Lethbridge is a leader in the effective use of technology to support learning and research; to prepare students, faculty members, and staff to work effectively in a highly technological environment; to manage the processes that support the delivery of programs and services; and to expand opportunities for individuals to learn, work creatively, and conduct research. We use technology to facilitate and enhance, not supplant, learning

relationships among students, faculty members, and other university stakeholders. The University considers technology a means, not an end.

OUR STRATEGIC PRIORITIES

With this Strategic Plan as the framework, The University of Lethbridge commits to continuing action in the areas in which we presently excel, as outlined in our Mission statement, and in those key areas where enhancement is required. The following Strategic Priorities represent these key areas, in which The University of Lethbridge will apply a special effort so that the institution can more successfully align itself with its Mission, Vision, and Fundamental Principles.

Students

- Improve student financial support through scholarships, bursaries, work opportunities, and other initiatives.
- Expand opportunities for graduate studies.
- Foster a sense of healthy culture and community for students.

Diversity

- Improve support and participation of First Nations in the University community.
- Ensure gender inclusivity by promoting and implementing equity within the University community.
- Increase the international focus of The University of Lethbridge, through the recruitment and exchange of students and faculty.

Teaching and Research

- Provide support for faculty in the enhancement of effective teaching skills and strategies.
- Pursue additional funding to support scholarly activity across a wide range of disciplines.
- Develop centres of research excellence across the faculties and schools.

Facilities

- Increase state-of-the-art academic space on campus.
- Increase student residence space.
- Provide access to additional recreation and leisure space.
- Expand research space in all disciplines.

Outreach

- Work with our alumni to help advance the mission and vision of The University of Lethbridge.
- Raise the profile of The University of Lethbridge in the provincial, national, and international arenas.
- Improve relationships and increase involvement with individuals and organizations for the good of The University of Lethbridge and the community.

OUR NEXT STEPS

The University of Lethbridge will continue to take action in the areas in which it currently excels, as outlined in the Mission, and in areas that embody and realize the Fundamental Principles. The Board of Governors, Faculties, Schools, students, administrative and support staff, and our alumni will be asked to identify their role in addressing our Strategic Priorities. The units will identify specific actions, targets, and dates for completing these targets. They will then be asked to report back to the Strategic Planning Group annually on their progress in accomplishing these targets.