

Seneca

Seneca in 2021: A planning framework for student success

January 2010





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Overview

As a leading Ontario postsecondary education institution, Seneca has both unique opportunities and fundamental responsibilities shaping our strategic framework for the next decade.

Our opportunities come from the GTA enrolment boom over the next 15 years, our legacy as a high-quality college, the government's emphasis on education and postsecondary credential attainment, the evolution of the system to recognize differentiation among colleges and the growing sophistication of Seneca itself. And our responsibilities are rooted in the same factors: we are a critical educational institution, located in the fastest growing region of the province at a time when Ontario needs more college graduates than ever before, and we are acknowledged as being capable of playing an even larger role in the province's economic and social well-being.

With the right focus, determination and investment, in 2021 we will be *the* leading college in Ontario, the preferred destination for students, employers, faculty and staff who are seeking excellence in career-related and professional education. Our brand and reputation will be based on the quality of our teaching and our strong commitment to students. We will provide relevant programs, services and supports that foster student success. Seneca will be considered the first-choice partner by the top-tier universities and a respected competitor by the undergraduate-focused universities.

In short, Seneca will mean success.

Our progress will be measured by, among other means: our rank in applications, the strength and depth of our partnerships with other PSE institutions, the demand for our graduates and our reputation among stakeholders.

While remaining a comprehensive college, we will build a discrete number of academic clusters with both "deep and wide" programs. (See Appendix A.) Each major cluster will be characterized by a family of credentials: typically one or more degree offerings, related two- and three-year diplomas and graduate certificates, along with appropriate continuing education and corporate training offerings. Our degrees will remain career-oriented, while becoming progressively broader to reflect growing market demand for ever-increasing advanced credentials as entry-level requirements to the jobs of the new economy.

We will continue to promote access to postsecondary education and vocational training for students who demonstrate both commitment and potential, but lack credentials, through our *Seneca Skills* umbrella. *Seneca Skills* will offer programs such as academic upgrading, a variety of employment-related programs and others that focus on entry-level skills and increasing job opportunities.

We will offer flexible program delivery to meet the needs of our diverse student body, leveraging technology and recognizing the imperative for continuous learning. We will recruit, support and

promote the best faculty and staff who have the relevant skills to support Seneca as the student-centred leader in teaching and learning.

In setting these directions, we will seek to control our growth at a pace, and in academic areas, that allow us to continue to grow without compromising our focus on quality and student success. Our “smart growth” targets include the following:

- Full-time enrolment will grow about 3.5 per cent a year, or to roughly 30,000 students by 2021, with a supportive policy environment and appropriate government capital investments. We will focus our expansion in York Region at our Markham and King campuses to provide about 8,000 more student spaces.
- Between 15 and 20 per cent of our program activity will be in degrees. We will also increase the number of graduate certificates and advanced diplomas to become a preferred destination for college and university graduates to further their postsecondary education.
- Consistent with the labour market needs of the innovation-based economy, we will expand and strengthen our “deep and wide” academic clusters of expertise. The benefits will be more comprehensive offerings, greater credential recognition, increased academic laddering opportunities and greater linkages across sectors and disciplines. These areas include: financial services and business; community health and safety; creative arts and design; environment and sustainability; information and communications technology; and aerospace and flight technology. Within these clusters, there will be program areas where Seneca will be a provincially and nationally recognized leader. These will include foci in existing areas of excellence, such as financial services, open source technology, child development and biotechnology.
- To enrich students’ classroom experiences and provide a diverse and global perspective, we will continue to be a leader in international student education. Up to 15 per cent of our student population will be from outside Canada. In addition, we will pursue partnerships with international academic institutions to enhance pathways and mobility options for students.

Some of the initiatives that will be undertaken in support of these directions will include:

- Playing a leadership role in student mobility within the postsecondary system by building stronger pathways, particularly to the GTA universities. We will be the preferred partner to smaller colleges to provide their students opportunities for transfer and advanced diplomas.
- Broadening our proprietary degree offerings in areas such as business, technology and multidisciplinary studies, as well as developing our own nursing degree. In partnership with colleges and universities in the GTA, we will also develop innovative delivery models to address the imminent growth in demand for undergraduate education. A leading example is more “2 plus 2” degrees in areas such as interdisciplinary arts and other programs.
- Developing a significant public safety and community health education facility at the King Campus, in cooperation with York Region Police and fire services, aligning our police, fire and health services programs and developing programming focused on emergency services.

- Recognizing that the next decade will be marked by constrained government resources, ensuring we stay entrepreneurial and ready for partnership opportunities. We will look to create stronger connections with industry to grow our endowment and assist in capital investments. We will also look for strategic partnerships that will differentiate Seneca in the marketplace.
- Focusing our research activities on industry-driven research related to our degree offerings, as well as being the Ontario leader in applied research in pedagogy, building on current activities in areas such as retention research and the College Math Project.
- Increasing the number of reciprocal partnerships with high caliber, international PSE institutions, including opportunities for our students to study abroad.

Implicit in these directions are choices about what we will not, or no longer, be.

As our applications grow, and our growth is controlled, increasing numbers of applicants will not find places at Seneca. Our entry level requirements will climb, strengthening our status as a first-rank institution. Our high academic standards will be maintained, while our retention and graduation rates will improve. Through *Seneca Skills*, we will continue to offer access opportunities for non-traditional students, who can succeed at the college level but lack credentials.

Seneca has not traditionally focused on the apprenticeship trades, and we do not intend to increase activity in that area. We also shed our “community college” label, both in name and in reality, some time ago. The government does not fund us to accept every student who applies, nor would it serve our past, current or future students for us not to insist on rigorous academic standards for entry to our programs. Our approach infuses the Seneca credential with a consistent and differentiated excellence across all program areas.

We will also continually review our academic directions, with our industry partners and program advisory committees for opportunities for growth and further focus. While we have to be sensitive to the ebb and flow of business and economic cycles, we also need to review programs with low or declining enrolment to ensure a continued fit with our academic directions.

This framework sets out a direction for Seneca’s own success: a distinctive positioning in the postsecondary marketplace based on an unapologetic drive to be the best college.

Our mission has evolved, as have the education system and the economy in which we are preparing our students to participate. But at heart we remain relentlessly focused on providing our students with the highest-quality, career-related and professional education possible. And if we accomplish that, then truly Seneca is success.

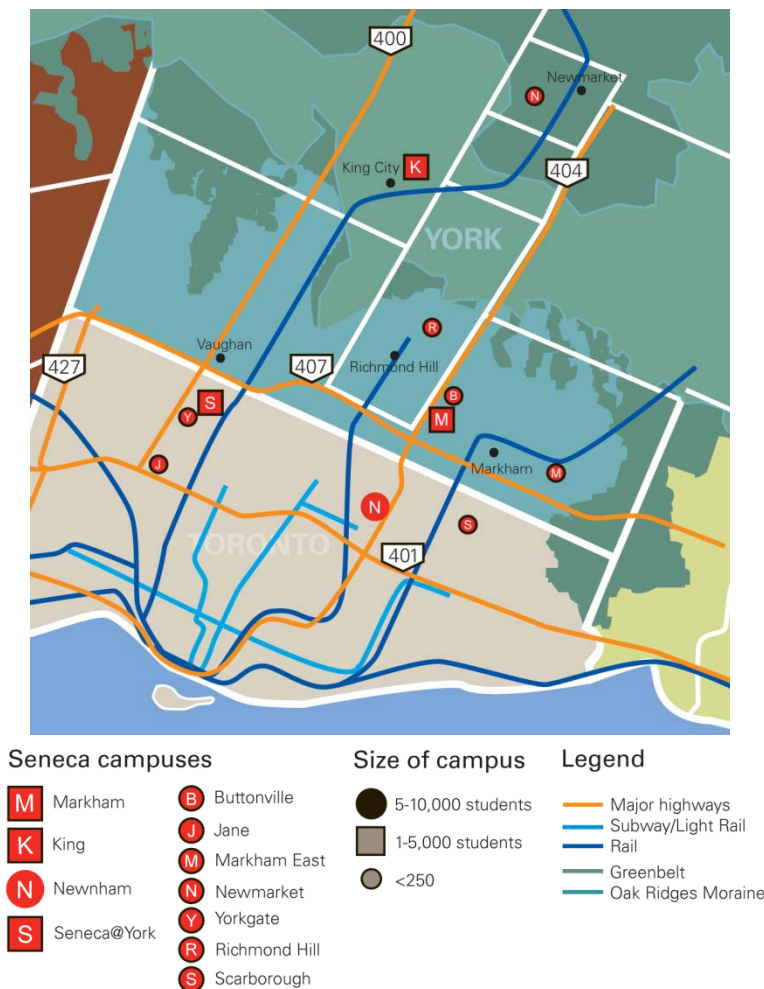
Seneca’s footprint:

Seneca’s has 11 locations in the Greater Toronto Area (GTA)—five in Toronto and six in York Region. Within these boundaries, the College is a concerned and engaged stakeholder in the actions and directions of the municipal governments and communities in Toronto, Markham, King, Newmarket, Richmond Hill and Vaughan, as well as the regional government in York.

In the GTA, five colleges and three universities provide varying levels of applied training and skills development, research facilities, apprenticeships and career development opportunities to meet diverse workforce needs. It is a competitive, yet differentiated landscape (In depth profiles of GTA postsecondary institutions are on pp. 24-31).

Geographically and strategically, Seneca is well-positioned to provide the postsecondary educational opportunities, training, research and partnerships necessary to meet the needs of students, businesses and other community stakeholders to succeed in a very competitive economic environment. This is especially the case in the growing, diverse population of York Region.

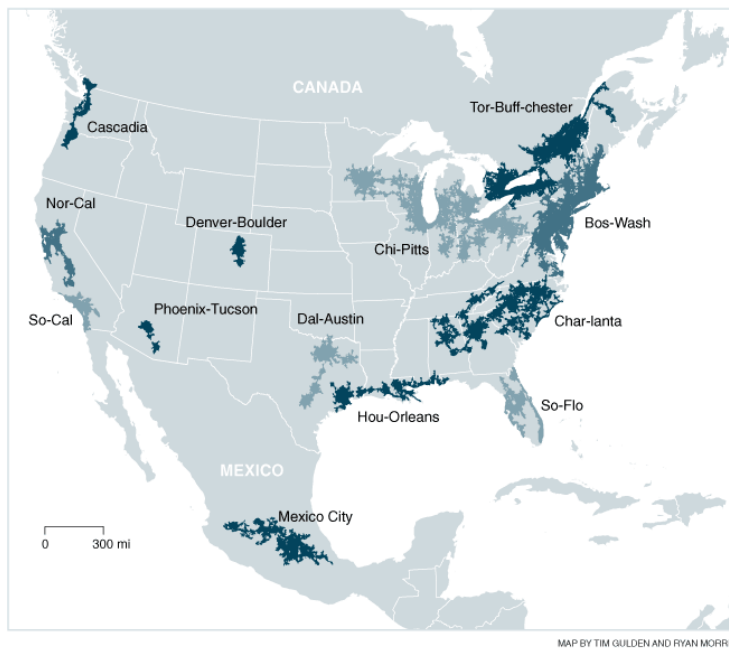
Fig.1: Seneca’s placement in the GTA



Greater Toronto is the fastest growing area in Ontario, with an expected population of 8.3 million by 2030, or more than half of Ontario’s population. The largest proportion of the province’s current population (six million people) lives in the GTA (46.8 per cent). By 2031, the age-18-to-21 population in the GTA is expected to grow by about 69,000 individuals over 2007 levels.

The importance of the GTA to the provincial and national economy is clear. In fact, the GTA is an important cluster in the North American economy. Together with other regional centres, the GTA mirrors what Richard Florida et al. (2007), refer to as a “Mega Region,” or “polycentric agglomeration of cities and their low-density hinterlands.” These regions “represent new, natural, economic units that emerge as metropolitan regions that not only grow upward and become denser, but grow outward into one another (6).”¹ This “Tor-Buff-chester” Mega Region is the fifth largest grouping of people in North America.

Fig.2: North America “Mega Regions”



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Within the GTA, York is the fastest growing region and accounts for approximately 16 per cent of the GTA’s population, which is projected to increase to 1.28 million by 2028. Nearly eight of every 10 immigrants to Ontario and four of every 10 immigrants to Canada settled in the GTA. Immigrants now comprise 50 per cent of the population in Toronto and 56.5 per cent in Markham.

¹ Florida, Richard et al. (2007). “The Rise of the Mega Region.” The Martin Prosperity Institute. University of Toronto.

Fig.3: Regional growth rates in Ontario 1995-2007

	1995	2007	Change	Growth rate
Central (GTA)	482,423	610,734	128,311	26.6 per cent
East	166,826	185,259	18,433	11.0 per cent
West	311,216	346,227	35,011	11.2 per cent
Northern	84,901	77,747	-7,154	-8.4 per cent
Ontario	1,045,366	1,219,967	174,601	16.7 per cent

Source: MTCU

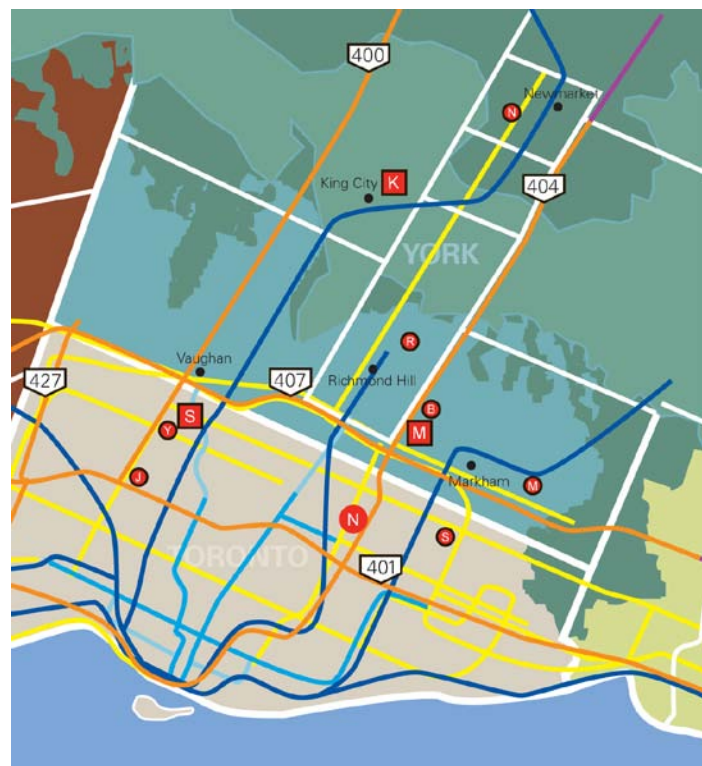
Toronto

Canada’s largest city is not immune to the fiscal hardships and infrastructure concerns being experienced in areas across the country. Toronto faces a \$500 million structural budget shortfall, and although amalgamation has created Toronto the “megacity,” many of its parts operate with their own agendas, especially in the areas of planning.

Toronto will encounter change on many levels in the coming years. In November 2010, the city will elect a new mayor, while starting preparations for the 2015 Pan Am games. It will also continue numerous capital infrastructure projects to reinvest in geographic areas, including the Downtown; the Central Waterfront; North York; Scarborough, Etobicoke, large brownfields and greenfields.

Toronto will also look to tackle the problems of poverty (a priority is its “Neighbourhood Strategy”); congestion; environmental sustainability; affordable housing; preserving green areas; investing in arts and culture; creating a positive

Fig.4: Future “Metrolinx” transit in GTA



Seneca campuses		Size of campus	Legend
M Markham	B Buttonville	● 5-10,000 students	— Major highways
K King	J Jane	■ 1-5,000 students	— Subway/Light Rail
N Newham	M Markham East	● <250	— Rail
S Seneca@York	N Newmarket		— Greenbelt
	Y Yorkgate		— Oak Ridges Moraine
	R Richmond Hill		— Planned highways
	S Scarborough		— Planned Subway/Light Rail
			— Planned Rapid Transit

environment for development and public transit. Public transit poses a mutual concern for Toronto and its neighbors in Peel and York regions and is one of the primary infrastructure priorities for all three, illustrated by the ongoing joint “Metrolinx” project. A provincially legislated agency, Metrolinx is mandated to develop an integrated, multi-modal transportation network that will improve travel from York and Durham, through Toronto, Peel, Halton and to Hamilton, over the next 25-30 years.

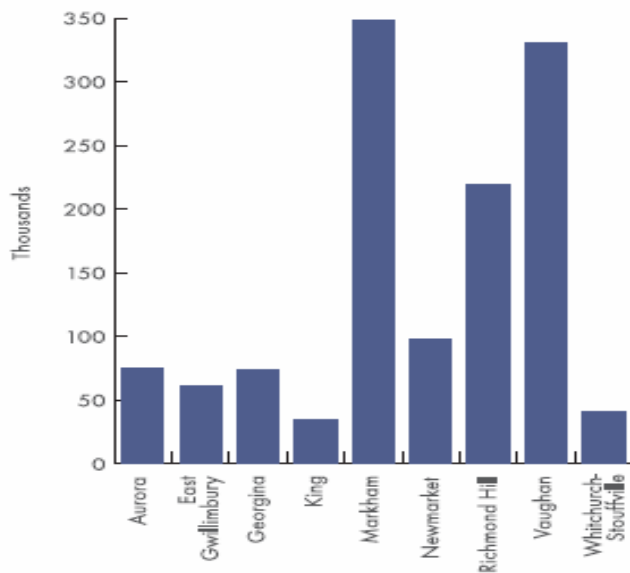
Accessible public transit, connecting Toronto with the municipalities in Peel and the Region of York will be crucial in battling congestion, carbon emissions and providing students and residents an efficient, affordable alternative for getting to work or classes. These future transit developments also have the potential to make Seneca campuses more accessible to a wider population base.

York Region

York Region includes the municipalities of Markham, Newmarket, Richmond Hill, Georgina, King, Aurora, and Whitchurch-Stouffville.

At the regional level, these municipalities have collaborated to develop “Vision 2026:” a long term plan for the attraction and retention of residents through accessible transportation options; a vibrant economy; responsive human services; housing choices; and balanced growth.

Fig.5: Current York Region population, by municipality



Source: York Region Planning and Development Services Department.

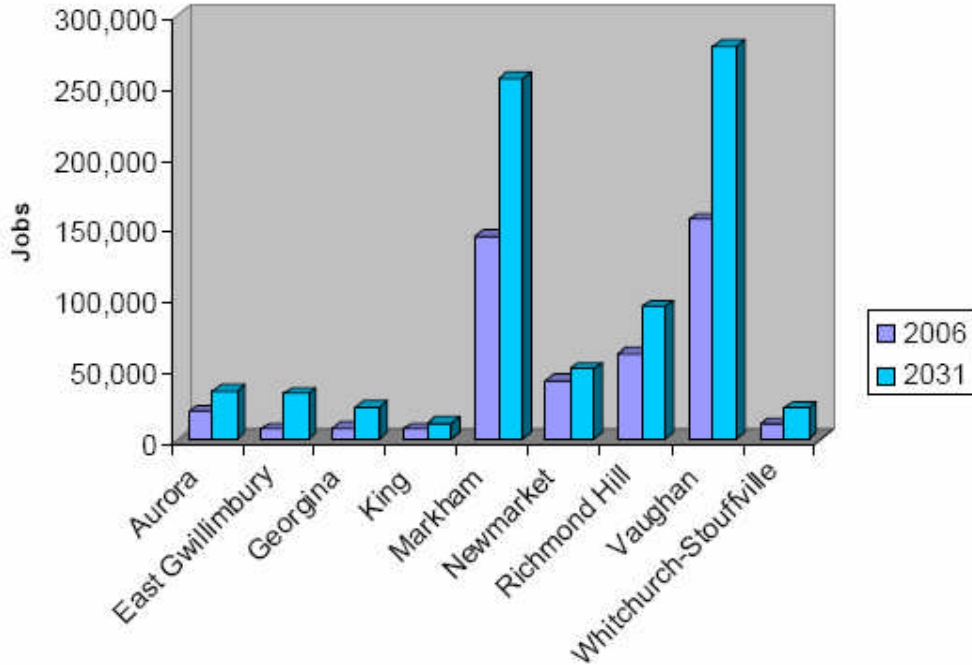
Within the Region, each municipality has also established priorities for growth, development and sustainability, with the common goals to battle traffic congestion; enhance public transit, and develop housing options, while maintaining “small town” histories.

Specifically, in the Town of Markham (where Seneca houses its newest campus), the Council has approved “Markham 2020,” a blueprint that targets four key sectors of opportunity: convergence of information and communications technology and life sciences;

information, entertainment and cultural industries; professional, scientific and technical services; and finance and insurance. Markham’s priorities align well with Seneca’s programming depth and strengths, specifically in financial services and information technology. Most of the

employment growth in York Region is occurring in the southern municipalities, like Markham, along with Richmond Hill and Vaughan.

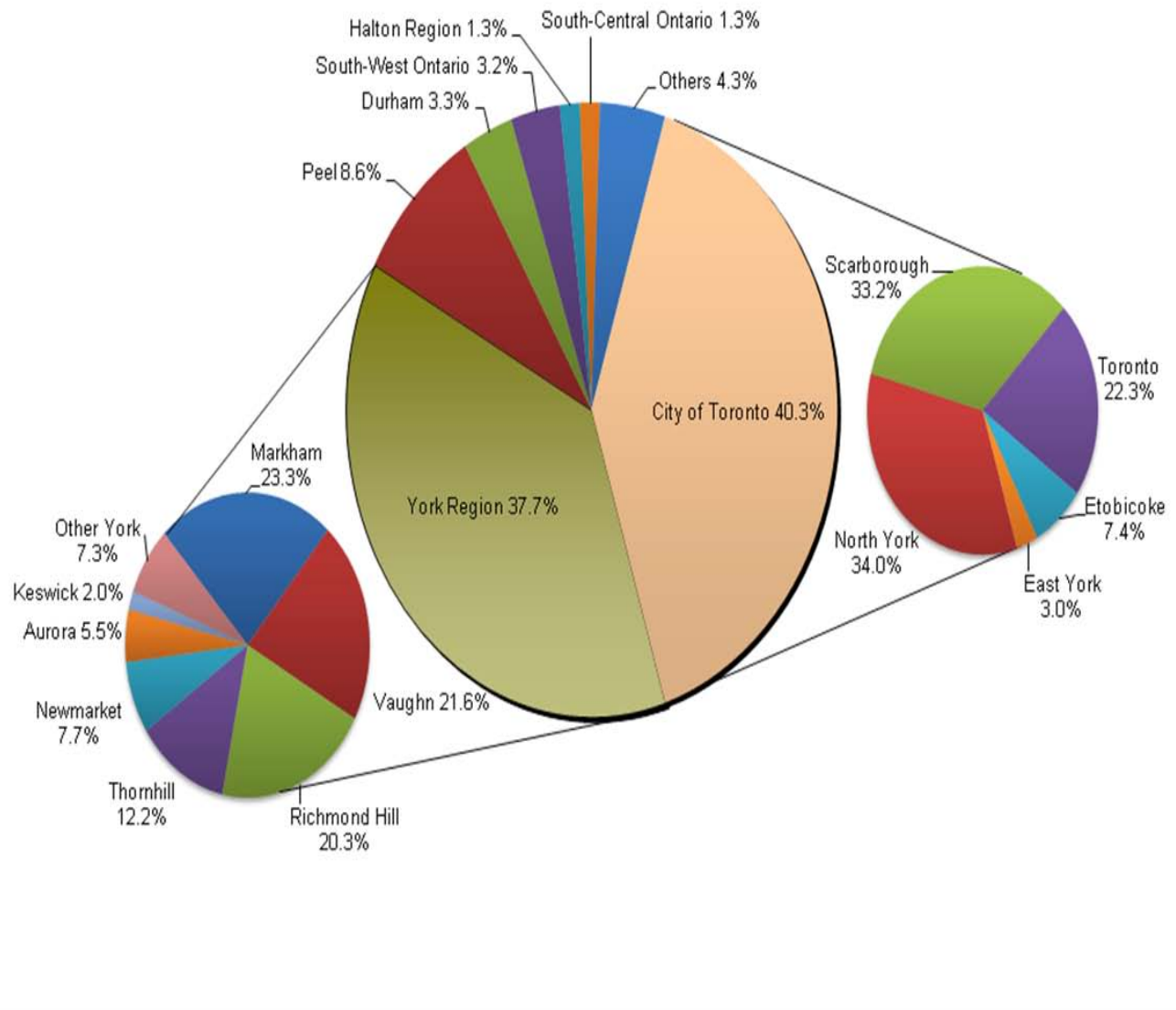
Fig.6: Employment by municipality, 2006/2031



Source: York Region

Relative to the GTA and Canada, York Region is young. Those aged 38 to 57 make up 32.5 per cent of the population, in comparison to 30.2 per cent in the GTA and 30.7 per cent nationally. In the GTA about 70 per cent of the growth in the age-18-to-21-population is projected to occur in York and Peel regions. Overall population growth in York and Peel regions is projected to be 1.3 million people over that same period. Demographics and geography favour Seneca dramatically, as Seneca attracts students from York Region and Toronto in almost equal numbers.

Fig.7: Seneca domestic enrollment, by municipality, fall 2009 and regional growth rates in Ontario 1995-2007



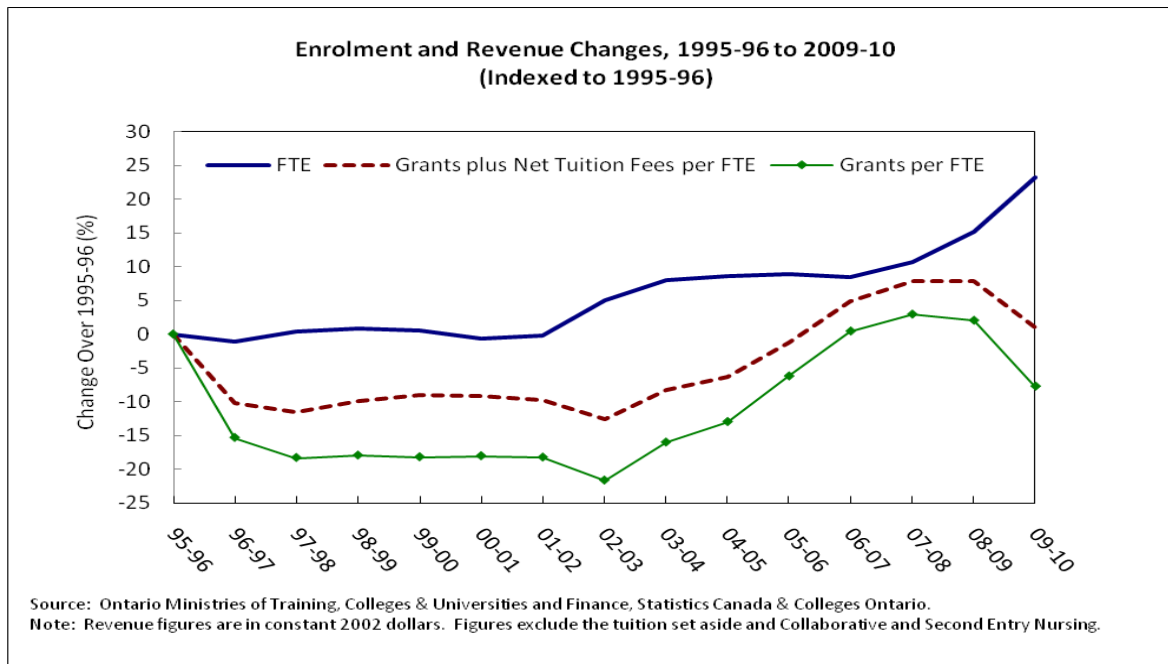
Source: Registrations Office, Seneca

As the many young people in York Region, and the wider GTA, look to enter the workforce, they will be part of a larger, increasingly international and extremely competitive Ontario population that will be well educated and experienced. A postsecondary credential will be viewed as a requirement, as will continual training and skills upgrading.

Provincial government synopsis:

The Ontario government is the level of government with the most impact on colleges. Through operating grants, other special purpose funding, and the controls the government places on tuition, the province controls or influences over 75 per cent of college revenues. Despite increases in recent years, provincial government funding has not kept pace with the rate of inflation or system growth. This situation is not likely to change in the near future, as the economy will be the overarching priority for the McGuinty government in the months ahead.

Fig.8: Enrollment and revenue changes 1995-2010



Ontario, given its reliance on the manufacturing sector, was impacted by the softening economy in the United States, even before the recession was felt by other jurisdictions. In early 2008, it was announced that Ontario had become a “have not” province for the first time in its history, entitling the province to equalization payments from the federal government.

The province announced that the deficit for 2008-2009 (fiscal year ending March 31, 2009) was \$6.4 billion, instead of the \$3.9 billion that had been predicted in the March Provincial Budget. This deficit follows three consecutive years of balanced budgets. The Fall Economic Statement conceded a deficit of \$24.7 billion for 2009-2010.

In the midst of the economic woes, the government is facing the implementation of a harmonized GST and PST. The government positioned the tax as a modernization, supportive of business investment. Instead it has raised the ire of many small business owners, as well as rank and file Ontarians. (Items that were excluded from PST will now be taxed under the harmonized tax.) Government caucus members have been feeling the heat on the harmonized tax from constituents, which has led to some tough discussions between MPPs, the premier and Cabinet.

The harmonized tax issue is seen as the biggest vulnerability to the government and will remain a focus by the opposition parties leading up to the next election in October 2011. Now that the McGuinty government has passed the halfway point in its mandate, its attention will increasingly move towards that election milestone. Key priorities that still need to be implemented include the move to full-day kindergarten and meeting the targets of the poverty reduction strategy. Both these decisions are costly at a time when all government spending is under a microscope. The accountability dramas at eHealth, OLG and other ministries have eroded the government's credibility as good fiscal managers and stewards of the province, and it will look to regain some lost ground in this regard.

For postsecondary education, the government is faced with the end of its "Reaching Higher" plan. This means that multi-year funding arrangements and the current tuition framework need to be replaced. The government is currently considering what it will do for a follow-up to Reaching Higher. Increasing access to postsecondary education, improving quality and student success remain priorities for the government, and it recognizes the growth pressures specific to the GTA. However, given the significant economic pressures, the McGuinty Government faces, Reaching Higher's successor will likely be high on lofty goals but without the huge a boost to funding that was a central figure of Reaching Higher. Colleges have been told that all these announcements will be wrapped together with the provincial budget that is expected in mid-March. Until the March budget is delivered, it is very difficult for Seneca to produce long-term projections. Colleges and universities will be looking closely for clarity in the government's direction to be able to start planning for the future.

For the upcoming budget, the government will need to consider some difficult options, including tax increases; lobbying for increased federal transfer payments; targeted program cuts; and other government expenditure reductions. With tax increases unlikely (given the looming election) and the federal government's inability to provide significant increases in transfer payments (due to its own fiscal constraints), there will be a focus on other cost containment measures.

The government is quite aware of the impact of public sector wage costs on its attempts to contain transfers to crown and public agencies and is paying attention to wage settlements in municipalities, and the university/college, school and hospital sectors. While the government is likely going to provide sustained support for education and health care, it does not want to see programs and services eroded at the cost of public sector wage increases. The government will also look to increase accountability by reporting on the outcomes of its investments.

Federal government synopsis:

The federal government is an indirect partner in terms of postsecondary education as the constitution states that education is a provincial responsibility. Other than providing transfer payments to the province, the federal government has made targeted investments in PSE, focusing on providing research funding and funding for some student assistance.

Like at the provincial level, the number one priority for the federal government continues to be the Canadian economy. A ten-minister cabinet shuffle took place January 19, while talk of an election in 2010 continues, in an environment where each of the political parties has not been able to break out of static levels of support. As the prime minister faces criticism for the second prorogation of parliament in less than a year and questions about the treatment of detainees in Afghanistan, his government will do its best to promote the benefits of the Economic Action Plan, and the projects it has funded. The Harper government will also hope that the focus of the public attention will shift to February's Winter Olympic Games in Vancouver.

In early March 2010, the next Federal Budget will be introduced, with fiscal austerity as the theme. It is expected that while there will be no increases in transfer payments to the provinces with the funding flat lined. The tightening of the purse is in direct contrast to the budget in January 2009, which included the \$62 billion "Economic Action Plan," a broad stimulus package for infrastructure renewal. The Plan provided "Knowledge Infrastructure Program (KIP)" funding for colleges and universities, done jointly with provincial and territorial counterparts. This initiative represented an extraordinary, one-time foray into capital investment at the federal level. All told, the federal government will spend \$2 billion on 450 projects at colleges and universities.

The federal government has also focused on many other issues that have impacted postsecondary education and training such as stimulating the workforce by extending employment insurance benefits, expanding training programs, providing grants for apprentices and promoting work sharing. There has also been a push to expand graduate student internships.

Other PSE-related issues at the federal level include the winding down of funding for the Canadian Millennium Scholarship Foundation (December 31, 2009) and the Canadian Council on Learning (July 6, 2010). The government's review of student financial assistance found that the Foundation had limited success in encouraging more people to go to college or university and did not provide students with predictable funding from one year to the next.

With the announced conclusion of these programs, the 2008 Federal Budget introduced new student financial assistance programs through the "Advantage Canada" initiative. This includes \$350 million investment in 2009-10 and \$430 million in 2012-13 for a new, consolidated Canada Student Grant Program; \$123 million over four years to streamline the Canada Student Loans Program; increasing limits on the Registered Education Savings Plan; and textbook tax credits.

Federal assistance for newcomers joining the Canadian labour force comes from Citizenship and Immigration Canada (CIC), which runs a series of programs, administered locally, with complex eligibility and delivery requirements. CIC funds represent "flow through" funding for

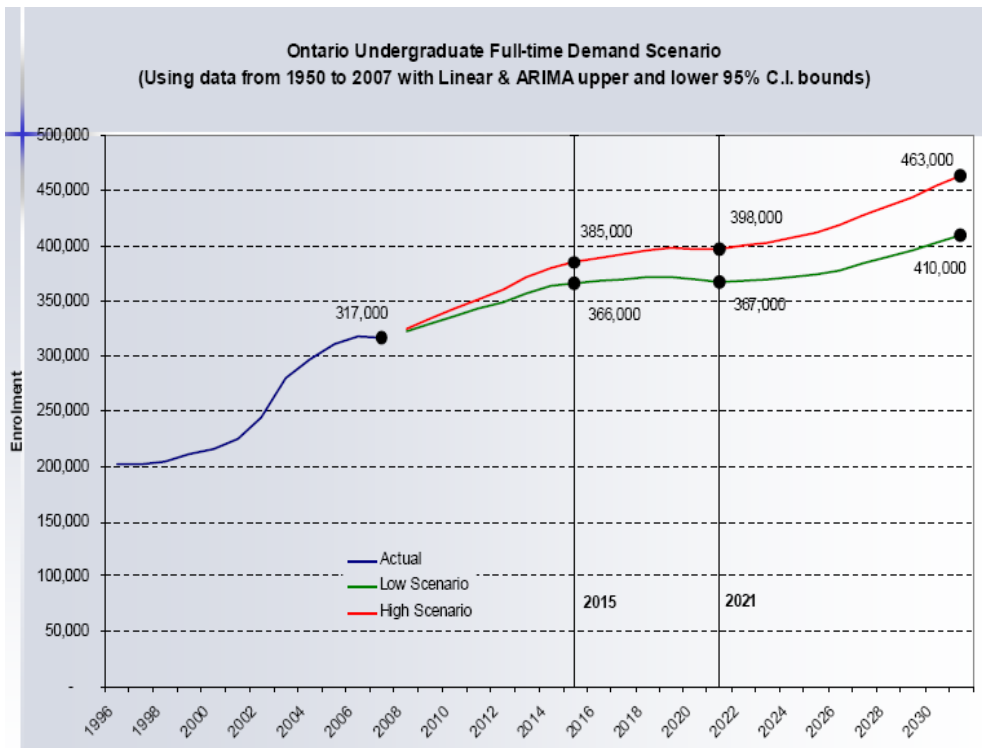
institutions, like Seneca, who are considered a “service provider organization” (not a PSE organization) with regard to this funding.

While the government’s focus remains on stimulating the economy, it is in Ontario colleges’ interest to continue to monitor federal agencies’ calls for funding proposals in the areas of applied research (specifically concerning Industry Canada priorities like science and technology), employment and training program development and newcomer integration.

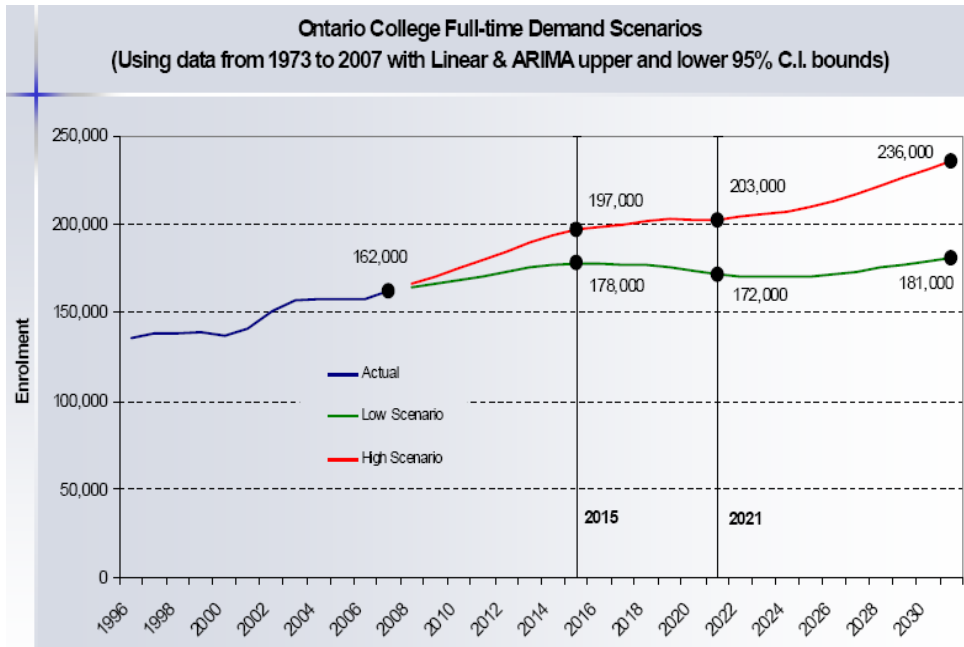
Postsecondary education in Ontario:

Ontario is an educated province. In 2007, the province had Canada’s second-highest PSE attainment rate (67 per cent of the population, aged 25 to 44) and the nation’s highest proportion of degree holders (22 per cent with bachelor’s degrees, 31 per cent including all university degrees).² Conservative estimates suggest that, by 2020, there will be an additional 78,000 undergraduate enrolments in Ontario, representing a 22 per cent increase over 2004-2005.

Fig.9: Projected PSE demand in Ontario, 1996-2034



² However, the province is seventh in the proportion of diploma or certificate holders (36 per cent): This may be attributable to the high number of skilled immigrants in Ontario with degrees.



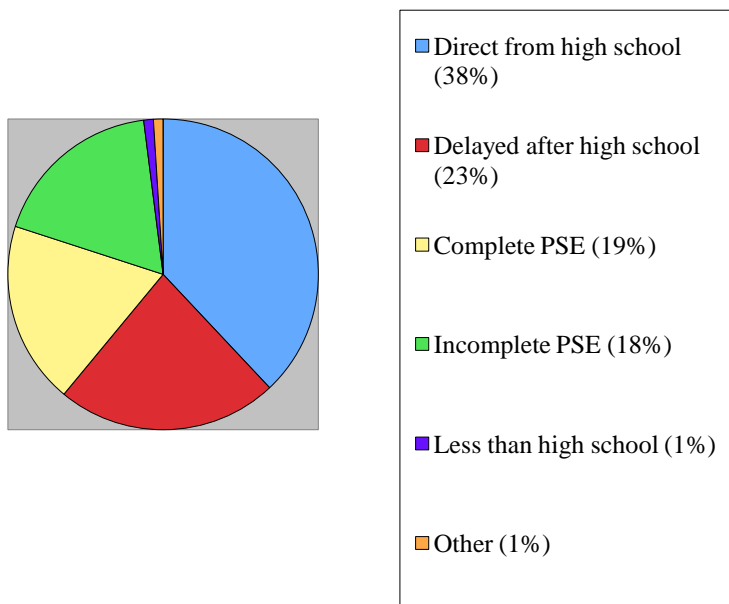
Source: MTCU/MEI Long Term Capital Planning Project, Courtyard Group, Toronto

Each year, approximately 500,000 students are served by Ontario's colleges: 200,000 full-time and 300,000 in continuing education. Almost 60 per cent of new entrants to PSE in Ontario enroll at a college. Furthermore, most of the province's 15-to-24-year-old population is located in the GTA, which will be the primary source of these additional students, with numbers reaching 82,000 by 2021. Along with providing opportunities for young students, colleges must attract more mature students. Strategies will include: Second Career, more frequent intakes continuous studies and more flexible learning alternatives.

Today's college student in Ontario:

Colleges welcome students at all stages of their academic and professional careers; more than one-third have previous PSE experience, and the majority of applicants come from outside secondary school, with 40 per cent applying directly from high school. Currently, twenty per cent of college applicants are over age 30.

Fig.10: Ontario students' pathway to college

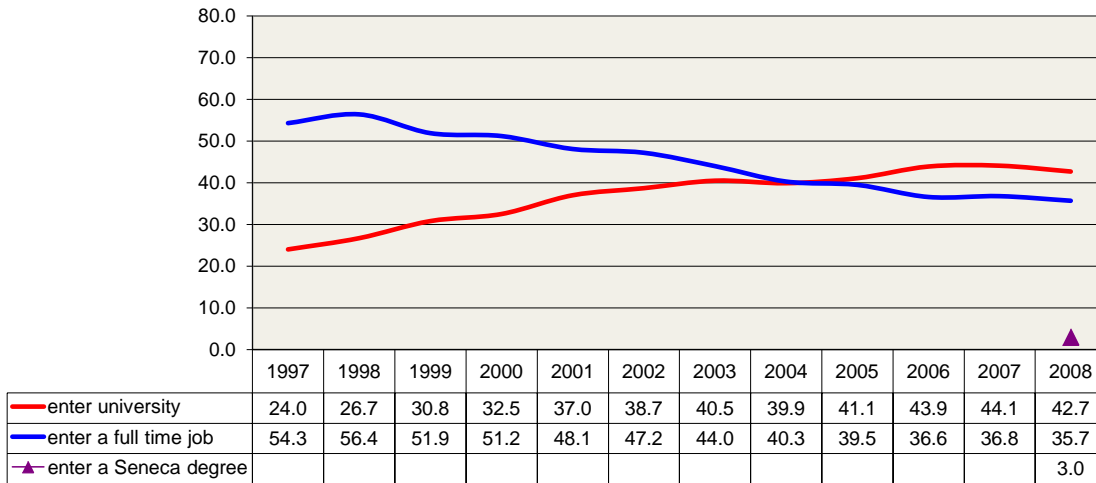


Source: Colleges Ontario

In 2008, 73 per cent of students surveyed cited employment or career preparation as the main goal for attending college. One third reported their “ultimate academic credential” was a degree, with 18 per cent intending to pursue a university bachelor’s degree and 12 per cent looking to attain a professional or graduate degree. For Seneca the numbers are even stronger. In 2008, 42.7 per cent of Seneca students surveyed expected to continue their educations at university.

As well, colleges offering options at various credential levels and/or joint programs with universities tend to benefit from “repeat customers,” as the majority of graduates who pursued further education either returned to their own colleges or enrolled at an Ontario university (largest sector: applied arts, lowest, health). Seventeen per cent of graduates in 2006-07 returned to college, while 82 per cent returned to their college of graduation.

Fig. 11: After graduation, current Seneca students expect to:



Fall CPT Background Questionnaire

Need for financial support:

College students continue to depend on financial assistance to achieve their academic and career objectives.

In 2008, 23 per cent of surveyed college applicants reported a household income of less than \$30,000, and 52 per cent had incomes below \$60,000. Seventy-one per cent of all applicants in 2008 were working at the time of their application (25 per cent full-time, 46 per cent part-time).

Financial accessibility is crucial for “first generation” PSE students as well. Currently, 36 per cent of college applicants are those coming from a household where they are the first to attend a PSE institution. Children of parents with no PSE are twice as likely to attend college as university.

In 2008-09, 47 per cent of Seneca students received OSAP funding, a three per cent increase from 2007-08 and eight per cent increase from 2006-07. As well, in 2008-09, Seneca assisted 7,604 students with bursary and scholarship funding.

Internationally trained professionals:

Colleges continue to be a necessary entry point for immigrants, whose first language is not English—specifically internationally trained professionals. Fifty per cent of adults who recently immigrated to Canada hold a university degree. However, many of these professionals’

credentials need to be supplemented by Canadian PSE programs. Immigrant applicants to Ontario’s colleges are more likely than Canadians to have a university degree, household incomes under \$30,000 and be older. In 2008, 17 per cent of surveyed college applicants were not born in Canada. (This coincides with the 2006 census report, which noted that 19 per cent of 15-to-24-year-old Ontarians was not born in Canada, as was 31 per cent of the population aged 25 to 44.)

These demographic trends illustrate the need for ongoing funding and programming catering to internationally trained professionals, who require language training and credential supplementation to draw upon their previously attained skills and knowledge and successfully integrate into the Canadian workforce. Seneca’s geographic locations in one of Canada’s most desirable regions for immigrants and strong program offerings in credential upgrading and language studies makes it a key resource for Canada’s growing number of newcomers.

Graduate outcomes:

In 2007-08, the overall graduation rate for college students in Ontario was 64.9 per cent. Currently, Seneca’s graduation rate is below the provincial average.

Fig.12: Seneca graduation rates 2003-2008

Measurement year	Number of entrants	Number of graduates	Graduation rate
2007-2008	8,489	4,736	55.8 per cent
2006-2007	8,466	4,549	53.7 per cent
2005-2006	8,354	4,469	53.5 per cent
2004-2005	7,651	4,083	53.4 per cent
2003-2004	7,390	3,825	51.8 per cent

Source: Seneca College

In Ontario, graduates in preparatory health sciences, general arts and sciences and art fundamentals were most likely to further their education at a college, while those studying general arts and sciences, preparatory health sciences, ECE and business admin were most likely for further their education at university. Higher credentials lead to higher entry level salaries for graduates.

Fig.13: Earnings (six months after graduation):*

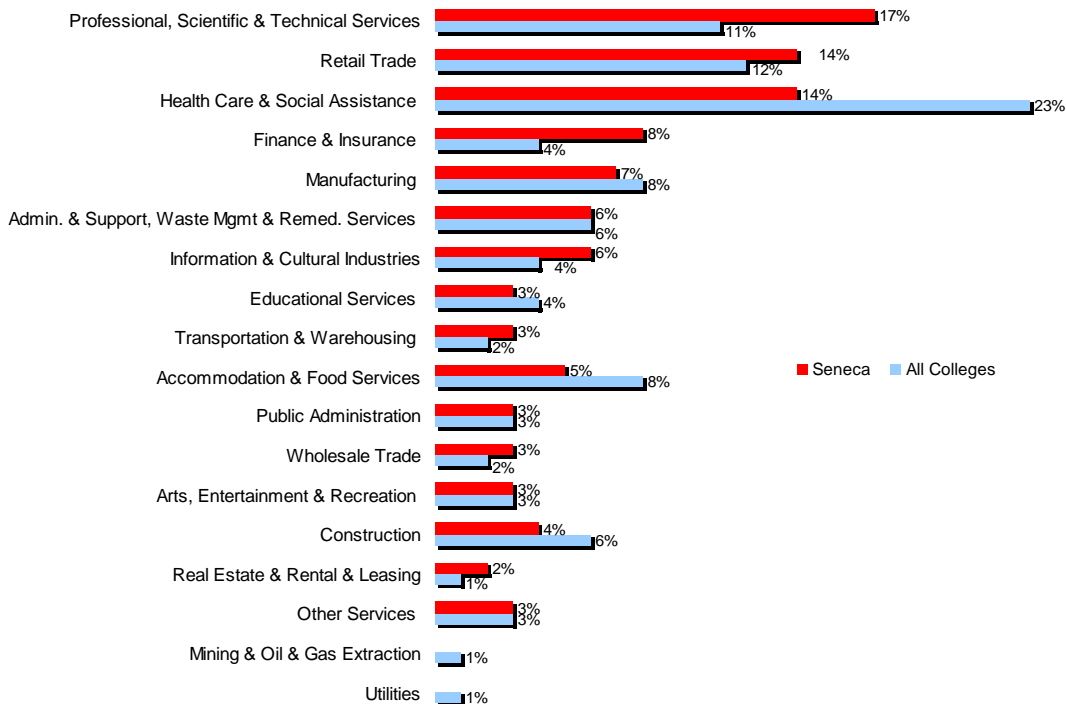
Credential	Annual income
One-year graduate certificate program	\$38,971
Degree	\$37,663
Advanced diploma	\$32,606
Diploma	\$32,606
Certificate	\$30,303

*The highest average and median annual earnings were for males, employed in the health sector (\$45,842 and \$46,464), and the lowest was for females in applied arts (\$30,151 and \$29,200).

Source: Colleges Ontario

Ontario's economy and the future workforce, provincially and locally

Fig. 14: Distribution of 2006-07 Seneca graduates, by major occupational category



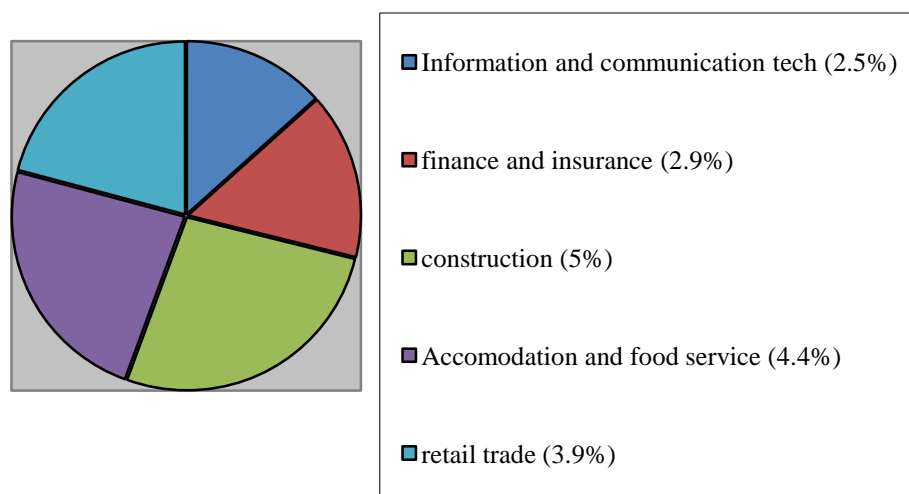
Source: KPI Grouping by sector based on North American Industry Classification System

Today's college graduates are joining a workforce that is beginning to grow for the first time since the economic downturn of 2008. Ontario's unemployment rate for September 2009 was 9.2 per cent, slightly higher than the August 2009 rate of 9.4 per cent. The Canadian average for September 2009 was 8.4 per cent.

Economists and other experts are mixed in their prognosis of Ontario's economic recovery at this stage. However, given Ontario's reliance on manufacturing and exports, and the sluggish U.S. economy, coupled with a high Canadian dollar, it is anticipated that short-term economic recovery will lag other jurisdictions in Canada and globally.

An Overview by Industry Canada (November 2009) highlights some of Ontario's leading industries, including biotechnology, information and communication technology, finance and administration, tourism and retail, advanced manufacturing, emerging green technology and wholesale trade. As these industries continue to recover from the economic downturn, providing much of the province's GDP and employment destinations, colleges would be wise to examine program and credential development to increase demand for graduates and meet employment and training needs.

Fig.15: Employment growth by industry, November 2009



Source: Industry Canada

Current key industry drivers and trends, identified by Industry Canada and HRSDC:

- Ontario is the leading region in the pharmaceutical and biotechnology industry and home to more than half of the brand-name pharmaceutical companies in Canada, with the largest regional concentration of biotechnology firms in North America.
- The Conference Board of Canada forecasts a shortfall of 364,000 workers by 2025. One of every three job openings will be the result of retirements, impacting most sectors of the economy.
- HRSDC projects skill shortages at the national level in occupations such as:
- physicians; nurses; pharmacists; medical technicians and technologists, and assisting occupations; management occupations; occupations related to the oil and gas sector; some trades, especially construction related; some information technology occupations such as computer engineers and software engineers.
- Ontario accounts for about 50 per cent of the country's information and communication technology firms and revenue, as well as about half of national ICT employment and GDP.
- In order to remain globally competitive, Ontario's ICT sector will need to address some major challenges, namely the attraction and retention of talent, the need to increase R&D produced by Ontario ICT firms and universities, as well as the need to address declining enrollment in computer science at Ontario's universities.
- Financial services sector employs roughly 350,000 people in Ontario and accounts for 7.7 per cent of Ontario's total GDP.
- About 230,000 in the sector are employed in Toronto, making the city the third largest financial sector in North America behind New York and Chicago.
- The Ontario Ministry of Tourism is forecasting a recovery in the tourism industry in 2010. The total number of visitors (domestic and international) is expected to grow in the range of 1.3 per cent to 1.8 per cent annually between 2010 and 2013, after experiencing a 2.6 per cent decrease in 2009.
- The Pan Am games are expected to bring 10,000 participants and 250,000 visitors to Toronto and create 15,000 new jobs, primarily in tourism and construction.
- Ontario's retail and wholesale trade sector accounted for 11.8 per cent of the provinces total output and 17.3 per cent of employment in the Q2 of 2009. This translates to 660,000 jobs and \$28 billion in GDP.

The workforces in Toronto and York Region:

The workforces in Toronto and York Region are highly educated with immigrant and domestic workers. In 2006, 63.3 percent of the labour force in Toronto had completed a postsecondary education. In York, of adults between the ages of 25 to 64, 61.2 per cent have postsecondary education – higher than both the federal and provincial averages. In the years to come, both Toronto and York will need these educated employees.

Toronto's workforce continues to grow steadily. The City's overall employment in 2008 was 1.3 million, up by 0.8 per cent or 10,600 jobs from 2007. This represents the fifth consecutive year of growth. Full-time employment has continued to stay above the 1 million mark for the third year, growing to 1.02 million. This is an increase of 4,400 full-time employees and a growth of 6,200 part-time employees from 2007 to 285,400.

Currently, the largest share of jobs is found in the office sector (46.7 per cent), followed by the institutional (16.4 per cent), retail (11.3 per cent), manufacturing (10.9 per cent) and service (11.4 percent). These numbers reflect the diverse nature of the Toronto economy.

York Region continues to add between 15,000 and 20,000 jobs each year. At year end 2006, there were approximately 460,000 jobs in the Region. By 2011, York Region's job numbers are expected to increase to 540,000, 696,000 in 2026 and 780,000 by 2031.

Of the approximately 81,500 new jobs in the Region, the largest increases were in management (22.3 per cent), business, finance and administration (17 per cent) and natural and applied sciences and related occupations (15.3 per cent). Seneca alumni are helping to fill these positions, as 75 per cent of graduates on file have taken permanent residences in Toronto and York Region.

Fig. 16: Permanent residence for Seneca alumni on record

Geographic region of residence	Percentage of alumni
City of Toronto	49.7
York Region	25.12
Peel Region	6.94
Durham Region	4.76
South Central Ontario	3.86
Southwestern Ontario	3.55
Halton Region	1.40
Other	4.67

Source: Seneca College

With substantial job growth, like that in Toronto and York Region, comes the necessity of having enough qualified personnel to meet demands. This is a concern in the GTA and nationally. GTA colleges' and universities' roles will be compounded as providers of PSE credentials for a wide demographic of students, as well as training providers for those already in the workforce looking to upgrade their skills and research partnerships for SMEs and other industry partners. Each GTA institution brings specific strengths and foci to these stakeholders.

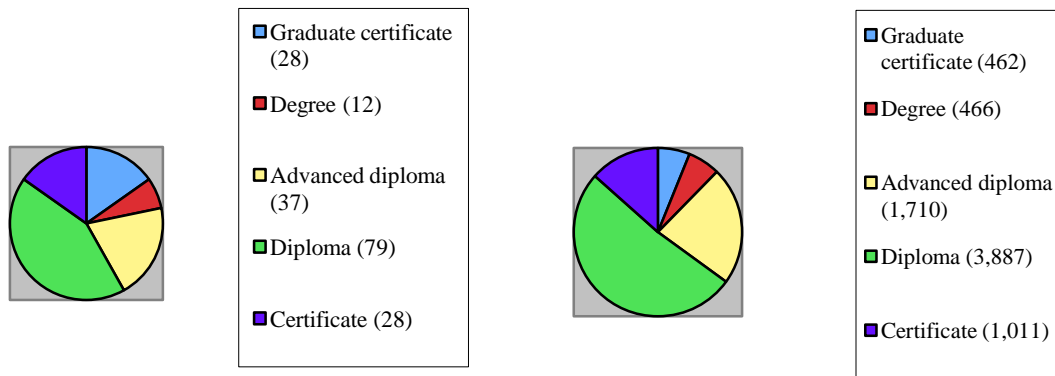
Seneca College: current dynamics

Overview:

Seneca's present enrollment is 20,029 full-time students and 70,000 continuing education registrations. This includes 3,732 international students. Seneca welcomes students at various stages of their academic and professional careers. Students have access to more than 500 career options, as well as 200 degree transfer options, with 64 universities in Canada, Australia, England, South Africa and the USA

The College's ever-expanding choice of pathways now includes graduate certificates, bachelor's degrees, advanced diplomas, diplomas, certificates and joint programs with York, the University of Toronto and Trent University.

Seneca credentials, by program number and enrollment (fall, 2009)



Seneca also offers newcomer bridging with training and re-employment services for internationally trained professionals, as well as upgrading for college eligibility. These diverse options allow Seneca to achieve its overall mission to provide accessibility to quality programs, services and experiences that ensure students are career-ready upon graduation.

In its 42-year history, it is estimated that more than 1 million people have pursued learning at Seneca.

Campuses and programs:

Newnham: (650,000 sq. ft., 51 acres), population (full-time): 10,330

Program areas: business; accounting; building systems; civil engineering; esthetics; event management; fashion; financial services; fire protection; floral design, human resources; legal studies; liberal arts; opticianry; and real property administration.

Seneca@York: (Stephen E. Quinlan Building: 270,000 sq. ft. TEL Building: 170,000 sq. ft.), population (full-time): 4,741

Seneca@York Program areas: 3D animation; bioinformatics; biotechnology; broadcasting; chemical laboratory studies; computer studies; corporate communications; creative advertising; graphic design; digital photography; music production; informatics and security; journalism; pharmaceutical regulatory affairs; and quality operations.

King Campus: (700 acres – Garriock Hall: 122,000 sq. ft., Modular building: 12,000 sq. ft. and Animal Health Facility: 26,000 sq. ft.), population (full-time): 3,347

Program areas: emergency services communications; early childhood education; forensic investigative studies; golf course technician; nursing; police foundations; recreation; social service; underwater skills; and veterinary technology.

Markham Campus: (27 acres, 256,053 sq. ft. building), population (full time): 1,487

Program areas: brand management; business administration; marketing; tourism and travel; and hotel and restaurant management.

Specialized campuses:

Buttonville Airport: a fleet of 14 planes, Bachelor of Applied Technology, Flight

Jane Campus: mechanical techniques and mechanical engineering technician.

Yorkgate: skills assessment; training and career counselling; assistance with job placement; and links to local services and referral agencies.

The College also has four community campuses in Markham, Newmarket, Richmond Hill and Scarborough. These satellite locations provide a variety of programs and resources for new Canadians, job seekers and fledgling entrepreneurs.

Competitive scans: GTA colleges

Fig. 17: College-by-College full-time enrollment by credential, fall 2009

Enrollment (number of programs)	Grad certificate	Degree	Advanced diploma	Diploma	Certificate	Total
Seneca	462 (28)	466 (12)	1,710 (37)	3,887 (79)	1,011 (28)	7,536 (184)
Centennial	509 (31)	94 (2)	1,127 (69)	2,708 (57)	923 (28)	5,361 (187)
Durham	337 (13)	N/A	1,143 (25)	1,191 (42)	706 (20)	3,377 (100)
Geo. Brown	720 (32)	241 (3)	2,132 (31)	3,455 (42)	1,703 (25)	8,251 (133)
Humber	809 (37)	871 (24)	1,848 (38)	4,662 (53)	1,286 (30)	9,476 (182)
Sheridan	547 (25)	359 (9)	1,666 (32)	4,462 (47)	1,168 (17)	8,202 (130)

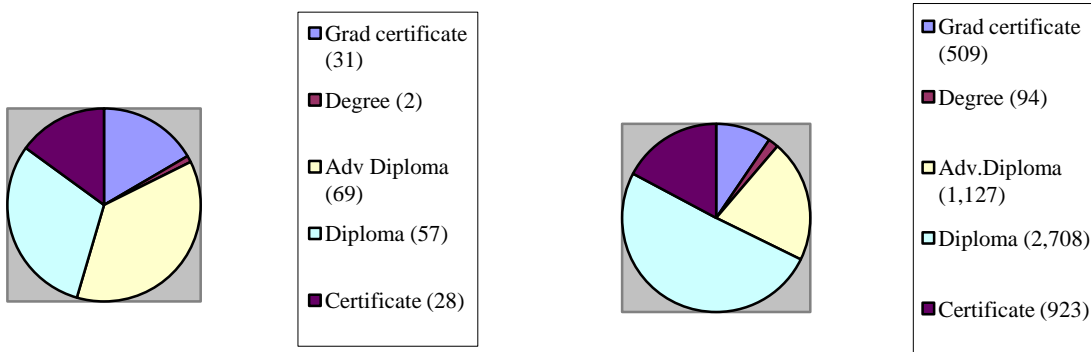
Source: OCAS

Centennial’s enrollment is 14,400 full-time students and 28,000 part time students.

Full-time student enrollment, by campus (fall 2009): Toronto Scarborough – Progress (4,053); Centre for Science and Technology (2,734); Ashtonbee (1,451); Centre for Creative Communication (772). (Does not include Second Career, partial load or international students.)

Centennial offers 28 graduate certificates; two applied degrees (Computer and communications networking, software systems designs); six joint degrees ; 69 advanced diplomas; 57 diplomas; 28 certificates. Many of the College’s certificate and diploma programs are offered as apprenticeships.

Credentials by program and enrollment (fall 2009)



In development:

Centennial received \$38 million in KIP funding towards a new academic facility at its Progress Campus. The 104,600-square-foot building will include a library and 22 additional classrooms, lab space and a theatre. The College is also building an employment training centre and athletics and wellness centre at the Progress campus. **New programs:** Global Citizenship and Equity; a joint University of Toronto - Scarborough journalism “boot camp;” Communications and Media Foundations; Baking and International Culinary Cuisine; Food Science Technology; Medical Robotics and Automation; and Construction Management.

Synopsis:

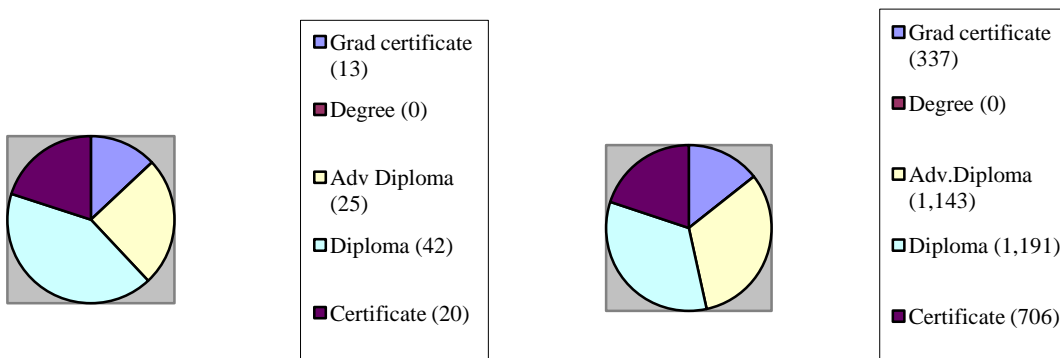
Centennial also has a campus located on the University of Toronto Scarborough, where there are five joint programs. Largely known for its strength in access programs, in recent years Centennial has focused initiatives on international development and encouraging students to see themselves as global citizens. A recent recruitment and media campaign has targeted students’ hearts and minds by using provocative images of the workforce of the future.

Durham College’s enrollment is 6,300 full-time, including 1,600 apprentices; 120 Ontario Youth Apprenticeship program students; and 13,000 part-time enrollments.

Durham offers 13 graduate certificates; 1 applied degree (Nursing – in collaboration with the University of Ontario Institute of Technology (UOIT)); 25 advanced diplomas; 42 diplomas; and 13 certificates, as well as the Community Employment Resource centres in Port Perry, Oshawa and Beaverton, which serve more than 1,735 new clients annually.

Full-time student enrollment, by campus (fall 2009): Oshawa (6,077); Whitby (478); Distance education (91); Uxbridge (25). Other locations: Beaverton, Port Perry. (Does not include Second Career, partial load or international students.)

Credentials by program and enrollment (fall 2009)



In development:

Durham received \$24 million in KIP funding to expand its Whitby Campus. This will facilitate overall school growth of 10 per cent and a three to six per cent growth in programs by 2011. Construction has also begun on a 35,000-square-foot Student Services building. **New programs:** Biotechnology Technologist; Business Entrepreneurship and Small Business; Business Fundamentals; Chemical Engineering Technology; Energy Audit Techniques; Environmental Technology; Pharmaceutical and Food Science Technology; Renewable Energy Technician.

Synopsis:

Durham is both literally and figuratively in the shadow of UOIT, which evolved from the college and is contiguous to the Durham campus. This new university has received a great deal of federal and provincial funding since its creation in 2002. There has been great expectation by the province for synergies and joint programming between Durham and UOIT. However, it is still early days for this partnership. While Trent has had a physical presence at the UOIT/Durham campus (600 students), it is now planning on opening an Oshawa campus in the next couple of years.

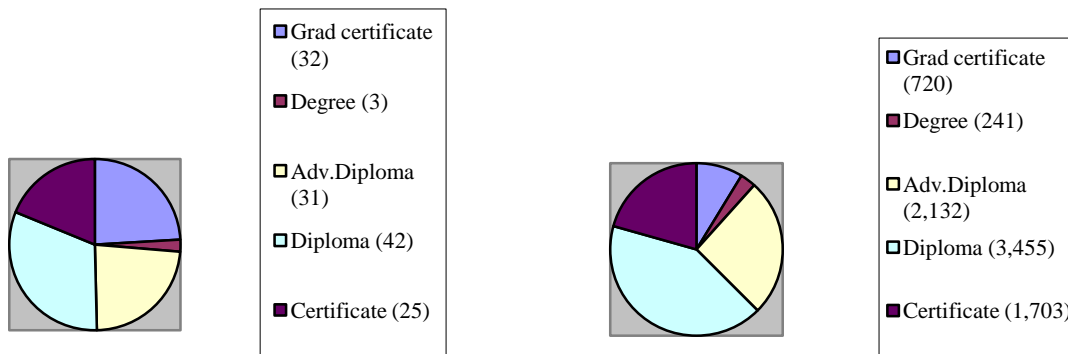


George Brown College’s enrollment is 18,300 full-time; 1,900 apprentices; and 68,000 continuing education registrants (including 11,000 distance learners).

Full-time student enrollment, by campus (fall 2009) Toronto: Casa Loma (4,700); St. James (5,984); Ryerson University (585); Distillery District (104); Hospitality Centre (2,433). **(Does not include Second Career, partial load or international students.)**

Toronto’s downtown college, George Brown offers 32 graduate certificates; 4 applied degrees; 31 advanced diplomas; 42 diplomas; and 25 certificates. The College offers niche studies in culinary arts, construction-based programs, fashion/jewelry market training and dental hygiene.

Credentials by program and enrollment (fall 2009)



In development:

George Brown received \$95 million in KIP for its Centre for Health Sciences on Toronto's Waterfront, which will create space for 3,500 students in the health sciences, as well as an athletic centre and residence. The College has also expanded its Centre for Hospitality and Culinary Arts into The Chefs’ House, the College’s student-run restaurant. As well, George Brown is spending more than \$1 million this year to reduce its eco footprint and is developing a graduate certificate in Research Commercialization and Innovation.

Synopsis:

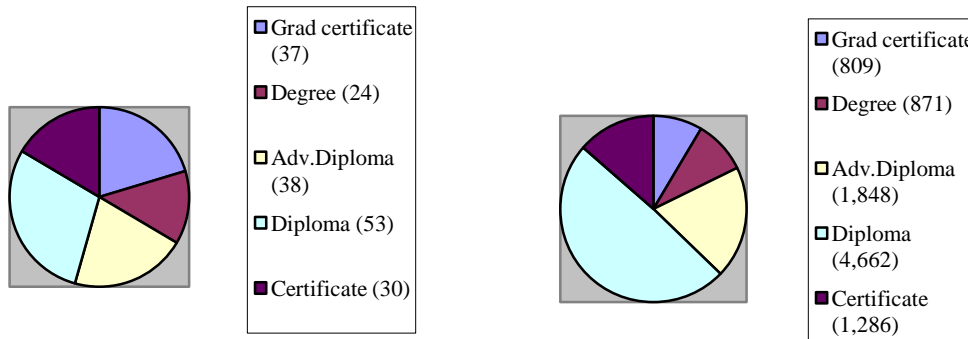
George Brown has taken a very aggressive stance in advertising and brand awareness, and outspends every other GTA college by a significant margin. “Brown Gets You the Job” has dominated billboards and bus shelters in Toronto for the last few years. The College has a strong relationship with its closely located “downtown university” Ryerson. In recent years, George Brown has also benefited by having a strong political champions in Mayor Miller and downtown councilors such as Kyle Rae, as well as a strong and engaged local MPP in George Smitherman.

Humber College’s enrollment is 21,000 full-time and 55,000 part-time students, 2,000 apprentices and 3,000 Guelph-Humber joint degree program students. Humber also welcomes 15,000 people annually through customized corporate training.

Humber offers 37 graduate certificates; 2 applied degrees; 69 advanced diplomas; 57 diplomas; and 28 certificates. Almost 100 ethno cultural groups are represented and 80 languages are spoken on Centennial campuses. The College also offers seven programs through its “Guelph-Humber” joint degree agreement.

Full-time student enrollment, by campus (fall 2009): Toronto – Humber North Campus (10,596); Humber Lakeshore Campus (5,152); Orangeville Campus (192). (Does not include Second Career, partial load or international students.)

Credentials by program and enrollment (fall 2009)



In development:

Humber received \$35 million in KIP funding to increase capacity for advanced studies at its Lakeshore Campus. Enrolment at Lakeshore is expected to grow by over 3,000 over the next 10 years, as a result. In total, the College is looking to add 280,000 square feet of space at its Lakeshore, North and Orangeville campuses, including the Centre for Health & Wellness and Centre for Trades & Technology, along with the Centre for Justice Leadership.

Humber will also invest \$10 million in revitalized capital equipment and facilities; and conduct four, concurrently funded research projects at \$400,000 annually and add one hundred and ten new online programs.

Synopsis:

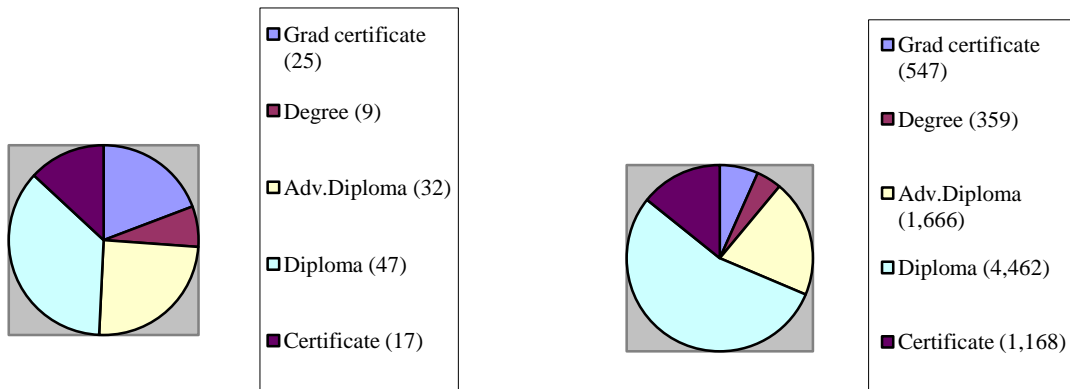
Humber’s unique Guelph partnership means that Guelph has a sort of “franchising approach” by building advanced credential capacity and programming at the College based upon the approaches of a geographically-distant partner. A similar partnership exists with Humber’s University of New Brunswick partnership in Nursing. Humber divides its marketing budget, centrally and by individual schools. Humber’s business school has undertaken a distinct campaign, “Humber means Business” and calls itself “The Business School.” The College attracts a great number of students from the west Toronto and Peel Region – an area which will see significant growth in PSE demand in the next ten years.



Sheridan College’s enrollment is 13,882 full-time and 70,863 continuing education and corporate training registrants.

Sheridan’s full-time enrollment, by campus (fall 2009): Oakville – Trafalgar (7,905); Skills Training Centre (189); Brampton – William G. Davis Campus (5,751). (Does not include Second Career, partial load or international students.)

Credentials by program and enrollment (fall 2009)



In development:

Sheridan received \$46.5 million in KIP funding towards the building a new campus in Mississauga to accommodate 1,200 business students 560 spaces for training foreign trained professionals. Sheridan will be Mississauga’s first college and plans are to grow this campus to 5,000 students. The College is also constructing a Centre for Healthy Communities; planning a Centre for Social Innovation and a Centre of Excellence in Interactive Digital Media, Gaming.

Synopsis:

A college that had sought polytechnic status, Sheridan identifies itself an “institute.” For many years, Sheridan was known as a college focused on arts and creative programs, e.g. 700 students are pursuing an animation degree. Now, Sheridan is broadening its identity as a college that is strong in business and health/life sciences. Sheridan is the provincial college leader by a wide margin in fundraising and alumni relations and has tapped into the communities it serves. Alumni relations are school-centric, not college-wide. And because of the clustering of Animation grads in the Los Angeles and San Francisco areas, Sheridan has alumni chapters in those cities and will be creating a U.S. foundation to benefit from their philanthropic intentions.

GTA universities

RYERSON UNIVERSITY

Ryerson's enrollment is 24,475 (undergraduate); 1,950 (graduate); 67,700 (continuing education). Included in this number are 703 international students.

Ryerson embraces its role as Toronto's downtown university. It sees itself similar to NYU, which is dispersed throughout New York's Greenwich Village. Ryerson's more than 35 facilities that have been traditionally situated in Toronto's downtown, between Yonge and Jarvis streets (east to west) and Carlton and Dundas streets (north to south). However, in the last few years, due to growth pressures, Ryerson has expanded beyond this traditional footprint with facilities either opened or in planning at Bay and Dundas, north of Carlton (Maple Leaf Gardens) and east of Jarvis. Ryerson has several joint programs with its neighbouring college, George Brown, including sharing Canada's largest school of nursing with 4,000 full- and part-time students.

In development:

Ryerson received \$32.9 million in KIP funding for the renovation of its 40,000 ft² Image Arts & New Media Teaching and Research Building. This will enhance the learning environment for 768 graduate and undergraduate students and increase research facilities for 29 faculty. Recently, the federal government announced that it would provide \$20,000,000 in funding to a Ryerson-Loblaws joint development that would see Maple Leaf Gardens transformed into a student recreation and sport centre with retail on the first two floors.

Synopsis:

Like many other Ontario universities, Ryerson believes that its future direction lies in becoming more research-intensive and with a higher proportion of graduate students. Ryerson is looking to double externally funded research to \$25 million by 2011. It has identified digital media, ICT, energy and sustainability, and cultural prosperity as key research priorities. Ryerson has been very innovative and entrepreneurial in its approach to development and has embraced the concept of public-private-partnerships. This has been helped by a high profile position in the heart of Toronto (Yonge and Dundas), the championship of local councilors and their local MPP who, until his recent resignation to run for mayor, was George Smitherman.

Regarding the impending GTA demand, Ryerson has indicated that it does not want to have a campus outside of downtown Toronto and will take a very cautious and incremental approach to growth.



The University of Toronto's enrollment includes 57,201 undergraduate, 13,891 graduate and 2,593 residents and post-graduate medical students. The international population includes 5,454 undergraduate, 1,633 graduate 779 residents and post-graduate medical students.

In development:

The University received KIP funding for three projects: \$70 million was provided for an instructional laboratory at its Mississauga Campus. This project involves a new instructional Centre and revitalized science laboratories to add modern, technologically advanced facilities and infrastructure to meet significant enrolment growth over the past decade.

At the University's Scarborough Campus, \$70 million of KIP funding will fund the creation of the Scarborough Instructional and Laboratory Centre. The Centre will support both undergraduate and graduate programs.

As well, \$20 million of KIP funding will be provided to the St. George Campus, which will cover a half of the costs for an Innovation Centre for the Canadian Mining Industry. The Innovation Centre will provide a studio-based experience for next generation design engineers, and interdisciplinary collaboration and research opportunities for undergraduate students, graduate students, and post-doctoral researchers of the Mineral and Civil Engineering programs.

The UofT's Scarborough campus will also be building a \$170 million sports complex for the 2015 Pan Am games, which afterwards, would serve as a joint City of Toronto/University of Toronto Athletics Centre. The bulk of the funds will come from the federal and provincial governments. The City had been championing this project as it was seen as a project that would accelerate light rapid transit development into eastern Scarborough as well as provide community infrastructure that could support an underserved area of Toronto.

Synopsis:

UofT, with 50,000 students at its downtown Toronto campus and 10,000 students at each of the Scarborough and Mississauga campuses, is increasingly operating as a tri-campus regional model within Ontario (parallels have been drawn between the University of California system). U of T is quite open in its positioning as Canada's world class university and the research powerhouse of the country. Its focus is on the quality of faculty and research, measured by the number of scholarly papers, citations and awards it produces. UofT has indicated that, although it can grow somewhat at the Mississauga and Scarborough campuses (5,000 full time students at each), the downtown campus is at capacity. The University has been clear in its intention to carve out a differentiated role and dramatically increase the numbers of graduate students over time, while lowering the number of undergraduates. Given this ambition, there are opportunities for Seneca to increase partnership activity with UofT. The proximity of University of Toronto Scarborough to Seneca's Markham and Newnham campuses makes it a good potential fit.

York's enrollment is 45,890 undergraduate students and 4,796 graduate students, including 3,236 international students from 150 countries. York shares a collaborative nursing program with Seneca and is Seneca's largest university partner, with nine formal agreements between the two institutions. However, the large majority of graduate attending York do so outside of any formal agreement. In total, 54 per cent of Seneca graduates attending university are enrolled at York. In turn, Seneca accounts 32.6 per cent of college graduates attending York—the largest of any Ontario college.

In development:

York received \$70 million in KIP funding for the construction of its Life Sciences Building. This building includes classroom capacity for 1215 full time students, 24 undergraduate teaching labs as well as ancillary facilities, lab prep and technical support areas. The third and fourth floors will be research labs, and office space for 45 full-time research faculty and 135 graduate assistants and post doctoral students. As well, \$50 million in KIP was received for the renovation and expansion of Osgoode Hall.

The University has also launched the new Faculty of Liberal Arts & Professional Studies, which combines the Atkinson Faculty of Liberal & Professional Studies and the Faculty of Arts and completed the ten-storey, 120,000 ft² York Research Tower as part of a larger capital development at the Keele campus, which includes a new public access facility for the Archives of Ontario.

The long-awaited extension of the subway to the York campus is scheduled to be completed in 2015. This will connect York to the City of Toronto, improve student life and should reduce legendary traffic and transportation woes.

Synopsis:

York is trying to move away from being known as a social sciences and humanities university. It has recently opened an engineering school and would very much like to build its stature in health and life sciences. In recent years, it has been lobbying the province for a medical school. York's reputation has been tarnished with the province and the public because of the very divisive and extended faculty strike of 2008 and also because of issues related to social justice and minority groups (an example being Israel Apartheid Week). These events have also had a direct impact on York's enrollment, as despite the record enrollments reported by virtually every other college and university, York's application numbers have yet to reach the level that they were prior to the 2008 labour disruption.