LIFELONG LEARNING  
FIVE-YEAR ACADEMIC PLAN  
2013-2018

1. Executive Summary

*It has been twenty plus years since Indian Affairs Minister Jane Stewart made her historic apology to the Aboriginal peoples for the atrocities of colonization. It's been twenty plus years since Parliament promised to focus on Aboriginal education. Now, finally, an institution—Simon Fraser University—is willing to go into a community and address the needs.*

The statement above was made by a First Nations partner who participated in Lifelong Learning’s Stepping Stones project, a blended delivery model that combines online educational resources regarding basic skills instruction with the on-site support of trained tutors who are members of participating aboriginal communities. The concept, curriculum, resources, and training were developed by staff in Lifelong Learning’s Community Education Program. The online modules were designed and delivered by 7th Floor Media, also part of Lifelong Learning.

The significant success of this project stems from the commitment central to the entire unit to provide quality educational opportunities in flexible formats to adults in Vancouver, the Lower Mainland, the province, and beyond. Stepping Stones is only one of the many excellent programs offered by Lifelong Learning and is a prime example of how Objective 3.1 in the Vice President, Academic’s Five-Year Academic Plan encapsulates the unit’s mission to continue to increase community engagement activity as well as to create new links and opportunities for under-served communities (Objectives 1.2.2 and 3.1.4), develop new credit and non-credit programs to serve mature, returning, and non-traditional students (Objective 1.1.8), as well as designing distance, blended, and online approaches to teaching and learning (Objective 1.1.8).

2. Core Activities

Lifelong Learning is the largest provider of non-credit programming at Simon Fraser University. The unit offers twenty certificates, three diplomas, and four programs that together had 10,788 fee-based registrations in FY 2011-2012. The Community Education Program, which provides access to education for under-represented communities, such as aboriginal and new immigrant, and delivers courses to build community capacities, had a further 843 registrations. Lifelong Learning also delivers several flexible degree or course completion programs in conjunction with Faculties and departments. The Centre for Online and Distance Education had 14,646 registrations in FY 2011-2012, the Integrated Studies Program (a cohort program for mature workers which provides credit for prior learning opportunities) had 464 enrolments, and SFU NOW (Nights or Weekends) had 621 enrolments by designated NOW students with another 1,875 registrations by general SFU students. Furthermore, the unit is a central to the University’s stated goal to be Canada’s most engaged research university. In FY 2011-2012, 8,671 attendees participated in free or sponsored events. Most notably, the Philosophers’ Café, the City Program, Seniors and Liberal Arts Programs, the Writing and Communications Program, and Continuing Studies in Science and the Environment provided access to programming that contributed to the intellectual and creative life of the Lower Mainland.
Altogether, the unit’s credit programs contributed $14,613,693 in tuition to the University, while non-credit revenues supported operations at the Vancouver and Surrey campuses, as well as the Surrey City Centre Library, in the form of nearly $700,000 for space and audio-visual rental. The unit also makes a substantial financial contribution to the University’s stated dedication to community engagement; for example, the cost of mounting the Philosophers’ Cafes is nearly $90,000 a year (in salary, benefits, and marketing). Lifelong Learning has yet to establish a rubric whereby its financial contributions to the University’s stated mission of community engagement can be calculated, but its valuable expertise in reaching out to communities can be gauged by the fact that nearly all the events listed under the Public Square initiative originate in and/or are offered by Lifelong Learning. Altogether, the activities of the unit emblematize President Petter’s three-pillared vision of the University to be “student centred, research driven, and community engaged.” Our programming strives to mobilize new knowledge into flexible delivery models that address the educational needs of our communities.

3. Planning Assumptions

In developing its contribution to the Academic Plan 2013-2018, Lifelong Learning made the following assumptions:

- That non-credit programming will continue to be revenue-driven and, so, dependent on the financial health and the availability of discretionary income spending in British Columbia and the nation in general (and that the unit will not be allowed to establish a contingency fund to address potential fluctuations in the marketplace)
- That there will be a 1% per annum increase in non-credit program registrations over the period of the Academic Plan, 2013-2018
- That the English Language and Culture Program will continue to experience variances in enrolment (and revenue) due to global influences (economic recovery, health concerns, foreign government spending) and national policy (Immigration Canada’s visa requirements) and that the Program will not be used by the University to assist strategic international student enrolment (such as a “bridge” for academically talented international students on external government scholarships whose English language skills do not meet Senate requirements)
- That support for our credit programming (SFU NOW, Extension Credit, CODE) will remain flat pending strategic decisions regarding undergraduate credit offerings at the Vancouver campus and online learning
- That the University will not increase its expectation of financial contribution from non-credit revenues in the form of space and audio-visual rental, or administrative overhead
- That the unit will continue to support community engagement opportunities at the same level without support from a base budget allocation (this assumption will have a significant impact on several programs, most notably programming designed to serve aboriginal communities—see below)
4. **Strategic Influences**

4.1 Opportunities

- The biggest single opportunity available to Lifelong Learning is to increase the non-credit and credit courses and programs delivered through blended and online delivery models. The opportunity for increased tuition revenue exists in delivering carefully designed, market-researched, and competitively priced non-credit certificates/diplomas and professional graduate credentials in a flexible format. The expertise for developing online delivery models exists both in CODE and 7th Floor Media, and Lifelong Learning’s marketing area is more than capable of conducting market research to determine what programming is attractive to working professionals in the province, the nation, and internationally. This opportunity is contingent upon a University strategy for online/blended education (please see below under “Threats, Internal”).

- There are considerable opportunities in developing methods of laddering non-credit courses into credit credentials. Already, faculty members in the Faculties of Environment and Science have approached non-credit program directors to discuss ways of incorporating non-credit curricula and practicum into graduate degrees. As the population of the province grows older, the rate of immigration increases, and the shortage of skilled workers grows, the demand for professional graduate credentials will increase, and the staff and instructors in Lifelong Learning have enormous expertise in designing courses that answer to career-focused education.

- Both the provincial and national governments have issued statements indicating a desire to increase both international student enrolment at all levels and the need for a skilled immigrant workforce. Given both Simon Fraser University’s reputation as Canada’s leading comprehensive post-secondary institution and British Columbia’s attractiveness as a location (particularly for immigrants from Asia and the Indian Subcontinent), there is the potential for growth in our language/communications offerings. The English Language and Culture Program as well as the Interpretation and Translation Program are well placed to serve the English language training needs of international students who have been or desire to be admitted to SFU as well to assist communication in our multi-national business, medical, and other sectors. The Writing and Communications Program also has current offerings and plans to develop additional certificates to address the need for improved communications and information transfer (such as in professional and technical writing, editing, public relations, and new media journalism).

- As the current resident population of the Lower Mainland ages, the demand for lifelong learning opportunities will continue to increase. For example, our vibrant Seniors Program already has the largest number of non-credit enrolments in the unit; the potential to grow courses in this non-revenue generating area exists, and the Program is looking into offering travel study and online courses. The demand for lifestyle programming from adults of all ages is evident in the rapid growth of our non-credit Liberal Arts courses, which began to be offered in Fall 2011. The challenge is to make programming in this area revenue-generating (breaking even is an immense challenge as it is). However, programs such as the Writers Studio, Southbank, and the liberal arts bring the unit and the University much good press and create diversity in our programming that may attract customers to enrol in our more profitable courses.
• Our community-centred FREE offerings have the potential for growth. Simon Fraser University Lifelong Learning is well known in the Lower Mainland for bringing individuals together in dialogue and advancing community capacity building. Again, the challenge is supporting this type of non-revenue generating programming and finding the fine line between addressing the University’s goal to be Canada’s most engaged research university and balancing the unit’s budget. One way to reconcile these disparate requirements is to create efficiencies in programming by building cooperation between our Interdisciplinary and Seniors/Liberal Arts Programs as well as other areas. In order to diversify our community engagement activities and to incorporate them into the University’s research mission, efforts are currently underway to develop teen “cafés” and to assess the pedagogical benefits to SFU by increasing the number of faculty and graduate students who serve as café moderators.

• There are still many opportunities to improve and expand our marketing practices (which is the envy of our competitors). The unit now has a single marketing website and is developing an annual marketing plan for all program areas. A customer management system will improve our inquiry to enrolment conversion rate, track a potential client’s “hit” on our webpages to enrolment, and make circumspect email marketing possible. Furthermore, if blended/online non-credit and graduate offerings increase, a special marketing initiative directed towards market analysis for online programming provincially, nationally, and even internationally will have to be undertaken. Our marketing will continue to employ social media to advance awareness of the unit’s mission and offerings (the marketing team has already received national recognition for its innovative use of social media).

• There is potential for our educational offerings to aboriginal communities--non-credit/credit and blended/online--to increase. As indicated above, the Community Education Program’s Stepping Stone project (designed and developed by 7th Floor Media) was hugely successful, and this flexible, adaptable model could be expanded to serve other indigenous communities. New immigrant worker education is another area for growth, depending on the nature of government and NGO funding. The success of the restorative justice certificate (an adaptation of courses offered by the Department of Criminology) indicates that offerings in conflict resolution would be popular. A certificate in this, as well as non-profit management and fundraising, will expand our revenue-generating community-focused programming.

• Other revenue-generating programs under consideration (whether f2f or online) include, but are not limited to, occupational health and safety, elder law, criminal intelligence analysis, plain language, risk management, business management, and transportation. Current certificates, such as human resources management and editing, may be revised and/or adapted to an online environment in order to further answer to the educational and career needs of our customers and to increase our market-share.

• Finally, the University needs to recognize the opportunities latent in Lifelong Learning. The curriculum design/delivery models for our non-credit and credit offerings are flexible, student-centred, and are based on best practices gained through research and market analysis. There is a significant opportunity for the University to generate revenue through professional graduate credentials (offered f2f and online) in partnership with the expertise available in Lifelong Learning to understand the educational needs of career-focused working adults. We have a ready-made structure for English language training
for pre and conditionally admitted students (both undergraduate and graduate). Our understanding of how to go about engaging the community through sustained and meaningful programming is second-to-none, and we have many notable successes in assisting traditionally under-represented students at the University to find pathways to post-secondary education. The unit already offers several programs that increase student success, such as the International Teaching Assistants program, the Aboriginal Bridge program, and degree-completion opportunities for working adults as represented by SFU NOW. The unit pledges to continue success in these areas, but it is up to the University to make use of the opportunities available at Lifelong Learning by employing the unit to deliver on some of its strategic emphases.

4.2 Threats

External:

- The non-credit education sector is an increasingly competitive marketplace. Unlike undergraduate or graduate degree education, which is still seen as providing a necessary “credential” that will enhance lifetime earnings, spending for non-credit education is regarded by many as discretionary and, unless enhanced by online offerings, locally branded. The Lower Mainland has many post-secondary institutions, nearly all of which offer non-credit education opportunities. Many of these institutions’ non-credit tuition is less than that at Simon Fraser University (for a variety of reasons); some offer “laddering” opportunities between non-credit courses and credit credentials, which are increasingly appealing to students. Although SFU is an invaluable “brand,” non-credit students are canny consumers who are looking for the best educational “deal.” This situation applies to areas such as aboriginal student programming as well as career-enhancement offerings.

- Private and government sectors have a huge impact on the financial success of our non-credit areas. For example, if tuition reimbursement becomes a thing of the past (and it is already a dying breed), many of our non-credit offerings will perish. Furthermore, if the economy remains stagnant or if a serious financial recession begins, non-credit enrolments are guaranteed to remain, at the best, flat or, at the worst, decline.

- The policies of foreign governments relating to travel, international health scares (whether imagined or real), and Canada Immigration’s visa requirements all greatly affect the unit’s financial success, particularly as regards our English Language and Culture Program and the Interpretation and Translation Program.

- Federal support for worker education, new immigrant training, and investment in pathways to education for aboriginal students have a direct impact on the well-being of many of Lifelong Learning’s areas.

- Increased professional graduate credentials, both f2f and online, by other post-secondary institutions will challenge SFU’s still almost nonexistent market share in this area.

- Ever-increasing online education opportunities (no matter the quality thereof) will edge SFU outside of the marketplace so that it will have to play a desperate game of “catch-up” to snag market awareness.
The lack of a University strategy around blended/online learning seriously impedes the ability of Lifelong Learning to launch online undergraduate courses that address course access to graduation, such as high demand or multiple-use elective courses (W,B,Q requirements) and reduces the opportunity to use online programming to generate revenue for the institution. Furthermore, development practices in online course production are process rather than product driven, a situation resulting from the requirement that departments and faculty initiate online course development discussions. If these issues are not addressed within the next year or two, SFU will be left behind in the online educational sector. A strategy that uses online education to address flexible course access for undergraduates and create revenue-generating opportunities for non-credit and graduate programs may necessitate a reconfiguration of the budget, one that could combine base budget support and revenue/risk-sharing models.

An almost total absence of professional graduate credentials available to both f2f and online students also means that SFU will soon lose the opportunity to increase revenue generation during a period when provincial funding for post-secondary education may remain flat or in real terms even decrease.

If the province decides to decrease significantly its grant to post-secondary institutions, SFU may turn to Lifelong Learning to increase its contribution to the University’s “bottom line,” despite the fact that the unit is probably one of the most efficiently run areas in the institution. Should this happen, less funds will be available to the unit for program development and best practice implementation. The same could occur if the University engages in expensive capital projects for which it has no new provincial funding.

Currently, the Aboriginal Bridge Program is on limited term funding from the University Priorities Fund. Continuing Studies in Science and Environment exists on an ad hoc funding arrangement between the VPA and three deans. Both programs will lose their funding commitments after FY 2013-2014.

Lifelong Learning, like all the University, exists in a unionized environment and thus is subject to negotiated increases in salaries, benefits, and pension contributions. All increases will have a significant negative impact on program costs and profitability.

While the unit has made great strides forward in creating various efficiencies in marketing, finances, and systematic planning, areas within the unit still often tend to regard themselves as separate and independent (not unlike the Faculties and the departments within them). Conversations continue to take place as to how the unit as a whole can combine to increase the vibrancy of its offerings while being ever mindful of the bottom line (especially in non-credit and community engagement areas). Only so much can be achieved through structural changes and financial reporting. The more cross-communication and cross-unit programming that occurs will only strengthen the unit and insure its place at the centre of the University. It must be said, however, that the disjoined structure of the unit only mirrors the lack of cohesion across the University as a whole.

Finally, Lifelong Learning currently enjoys the support of the President, Vice President, Academic, other vice presidents, and support units across the University, such as Finance and Graduate Studies. Should leadership in these areas change, the unit may be faced...
with demands from a rapacious administration that is more interest in financial contributions than community enhancement. Such a scenario would seriously challenge the place of the unit within the University not to mention the type of programming it provides.

5. Self-Assessment

5.1 Strengths

- Online education (currently SFU has the largest number of online enrolments in British Columbia) and application development
- Flexible degree offerings for mature and working students (this area would be enhanced if the Vancouver campus had consistent degree completion offerings for undergraduate and graduate students; the same could be said for Surrey)
- Nimble and responsive career and life-enhancing programming for adults
- Strong and innovative marketing
- Financial accounting mechanisms that promote and monitor revenue-generation as well as an ability, unique in the University, for determining expense-to-revenue-efficiencies
- Offerings for aboriginal students that either are or encourage pathways into post-secondary education, especially at SFU
- Lifelong Learning is well placed to tackle critical and complex societal issues by facilitating interdisciplinary collaboration between departments, faculties, First Nations, industry, NGOs, government and communities. Such projects link the university to communities in an attempt to find practical, research-based solutions.

5.2 Weaknesses

- Our English Language and Culture Program, although financially and pedagogically successful, faces strong competition from independent language schools that employ staff and instructors at rates much lower than SFU. These institutions also pay overseas agents a higher premium and often make promises regarding potential education pathways, the veracity of which is more than questionable. Furthermore, ELC is a serious English language study program as opposed to a “vacation” option. Oddly, these factors suggest that enrolment in ELC will remain soft unless the University chooses the program as a “pathway” to admission, whether to FIC or the institution.
- Lifelong Learning runs on a for-profit business model in an institution that focuses on expenditure rather than revenue. Although this situation is typical of continuing studies units across North America, it nevertheless impedes the unit’s mission to be revenue-generating, nimble, and responsive to community educational needs. Furthermore, as part of an institution that has negotiated salary/benefit packages with multiple unions and associations, there is no available opportunity to incentivize staff by providing bonuses or implementing other mechanisms to recognize and reward exemplary performance, especially for work that significantly increases revenue and cost savings.
- The budgeting models for both CODE, extension credit, and SFU NOW hide the true cost of course delivery by providing subsidies for departments as well as a reliance on casual teaching staff.
• Similarly, several of the programs operated out of Lifelong Learning serve the Faculties yet are either underfunded or funded in a manner that hides the true cost of programming. Programs that fit this description are the International Teaching Assistant Program, the Aboriginal Bridge Program, and those named in the point above.
• Like the University as a whole, various inefficient practices are embedded in Lifelong Learning. For example, the quality of our non-credit teaching would benefit from consistent, unit-wide evaluation by our students, and a review of our appointment processes might well reveal potential efficiencies; our data processing and storage systems are, for the most part, outmoded and in danger of collapse.
• Given the emphasis in Lifelong Learning on revenue-generation, non-credit programs are often responsible for various costs individually (such as room rental and supplies). A central budgeting model that takes into account an operational overhead may be more efficient.
• Although there is mention above regarding non-credit to credit laddering, there are no laddering opportunities across non-credit, thus reducing program flexibility and cross-program cooperation.
• Lifelong Learning’s community engagement activities are really quite incredible yet, because the University lacks a community engagement strategy or has yet to endorse the unit’s role in this important part of SFU’s mission, the efforts lack a certain focus and are program or even director specific.

6. Efficiencies

Many of the points above address the efficiencies needed to take place within the unit and the University if Lifelong Learning is to become more student-centred, community-engaged, and research-enhanced. However, the main efficiencies the unit could undertake are:

• Develop a strategic practice around online course development that incorporates expertise across the unit
• Combine all f2f credit course delivery and scheduling operations
• Create efficiencies in non-credit program development, delivery, and student services
• Effect unit-wide data gathering and storage practices
• Continue to enhance cross-unit planning and performance metrics
• Develop an internal overhead charge in order to create efficiencies in supply ordering and administration
• Develop a customer management system to recruit and retain students more efficiently
• Explore alternatives to current classroom/audio-visual scheduling and charge-back models to maximize space utilization and contain costs
• Develop a strategic plan for community engagement and establish a rubric wherein the contributions to the University in this area are measured
7. **Faculty Objectives**

**Engaging Students**

- The English Language and Culture Program currently conducts classroom observation and practicum experience for student teachers from the SFU Faculty of Education, Vancouver Community College, University of the Fraser Valley, and other post-secondary institutions in the Lower Mainland. The Program will continue to offer these services.
- ELC looks forward to working with colleagues across the university to develop cohesive strategies, structures, and services to support students who need additional English language training.
- The development of new f2f/online non-credit certificate and diploma programs will further engage students with our curricula. New programming in process is, but is not limited to, an online editing certificate, reconfiguration of business communications and professional writing curricula, reconfiguration of much of our management and professional certificates to answer to new developments in these areas of practice (this would include online certificates in non-profit management, human resources management, business management, and risk management), an online transportation certificate offered by the City Program, liberal arts programming (particularly travel opportunities), a fund raising certificate, marketing and sales management certificates, and a possible certificate in occupational health and safety. All of these initiatives combined will result in a 1 per cent per annum growth in non-credit registrations over 2013-2018.
- The employment of a customer management system will enable the unit to track student engagement from initial interest to credential completion.
- Lifelong Learning Enrolment Services could provide non-credit course enrolment for the University and thus assist students.
- We could continue to engage aboriginal and new immigrant students through development of reciprocal learning opportunities through strong partnerships and collaborations.
- The International Teaching Assistant Program will continue to work in conjunction with the Office of the Dean of Graduate Studies to provide support and training for international graduate students.

**Engaging Research**

- Lifelong Learning bases the development of all its curricula on research, best practices and current theories regarding adult, online, EAL, and community education. To insure that the unit is aligned with the research discoveries of SFU faculty, each program area has an advisory committee, the membership of which draws on SFU faculty and community representatives. Membership of advisory committees is published each year in the unit’s community report.
- Staff from all areas within the unit are encouraged to present at conferences in their subject field or area of expertise. Publications and presentations by Lifelong Learning staff are recorded each year in the unit’s community report.
• The expertise and knowledge of Lifelong Learning staff is regularly acknowledged by SFU departments and community agencies. Staff participation in department planning initiatives or programming and community councils or agencies is regularly reported in the unit’s annual community report.

Engaging Communities

• Lifelong Learning collects attendance data with regards to its free public events. This information is regularly reported in the unit’s annual community report.
• Websites, blogs, sponsored programming, practicums, and other initiatives by program areas within Lifelong Learning all engage the community on behalf of SFU. For example, the Writing and Communications Program, City Program, and Interdisciplinary Program all participate in organized events as part of the SFU Public Square. The Management and Professional Program oversees the development of online curricula and programming for the Salvation Army as well as organizes the annual speaker sponsored by an endowment from BMO.
• Lifelong Learning is the source of two of the University’s longest, most consistent, and most popular community offerings: the Philosophers’ Cafes and the Seniors Program. Growth in both of these programs is only limited by resources available.
• Practicums, such as those required of students in the career counseling and public relations certificate programs, are an excellent method of engaging with the business community and the public sectors and often result in student employment.
• Our Community Education Program is completely committed to engaging new immigrant and Aboriginal communities in reciprocal learning opportunities. Its growth is limited by funding available from the University Priorities Fund, government, and NGOs.

8. Possible Long Term Growth Scenarios

• Lifelong Learning is committed to growing non-credit registrations by 1 per cent per annum from 2013-2018.
• Online/blended courses and credentials could grow considerably over the next five years. A major factor determining growth is the development of a strategy for undergraduate course development that would free staff time to engage in revenue-generating programming in the form of both non-credit and graduate online credentials. Nimble production methods and cutting edge presentation and content are essential to successful online course growth.
• The development of premium fee professional graduate credentials offered through Lifelong Learning could result in significant revenue growth as long as the programming answers the career and educational needs of the potential student.
• Growth could be achieved through the further development of degree completion options through SFU NOW and through a cohort degree program for mature, working adults.
• The laddering of credentials is another significant growth area. Adult students are particularly interested in flexible educational models that ladder into one another. Lifelong Learning’s practical non-credit curricula and practicum provide excellent laddering opportunities into professional credentials.
• There is the opportunity to grow educational pathways for aboriginal students, whether through online, blended, or f2f delivery. Stable funding in this area is essential for meaningful and consistent growth.
• The English Language and Culture Program could grow if it was acknowledged by the University as the pre-admission/conditional admission English language training pathway to SFU. The International Teaching Assistants Program could also grow if it became the centre for EAL support of graduate students.
• Lifelong Learning’s enrolment management area could grow if it becomes the University’s centre for non-credit registrations.
• There is no limit to the growth Lifelong Learning could experience in its Seniors offerings, Philosopher Cafes, and other FREE and open public events. Whether the University wants to support growth in community engagement activities offered through Lifelong Learning, however, is another matter.

9. Communication

• Lifelong Learning’s Five-Year Academic Plan for 2013-2018 is built from plans submitted by the directors of all programmatic and administrative areas within the unit. They, in turn, consulted with their staff in the creation of their area’s plan. The unit’s aggregate Academic Plan will be reviewed by the Lifelong Learning Management Committee. Any suggestions or corrections will be made prior to the Plan being submitted for review to all program directors and administrative unit heads. Once the Plan has been reviewed and approved by all managers in the unit, it will be shared with the entire staff, as will the final version of the VPA’s Academic Plan.