Three Year Academic Plan 2010 – 2013

October 21, 2009
Three Year Academic Plan (2010 – 2013)

FACULTY OF BUSINESS ADMINISTRATION:

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1. Executive Summary

Over the past three years, the Faculty of Business Administration (FBA) has continued to establish itself as a high quality business school. We are one of approximately sixty business schools (less than one percent of the world total) to have obtained both AACSB and EQUIS accreditation. Our research performance continues to improve and we now rank among the top 100 business schools in the world based on publications in elite journals. Both our graduate and undergraduate programs continue to attract large numbers of excellent students, at premium fees. We have developed a strategy that builds on our strengths, provides focus, and clearly positions us in terms of research, programs, and our relationship to the community.

The FBA is therefore well-positioned to take advantage of opportunities that will enhance our status even further. These opportunities include possible growth of premium fee graduate programs, innovative extensions to the undergraduate program, and new funded research. Many of these opportunities are interdisciplinary and will involve other faculties at SFU.

In terms of the major challenges and constraints that will limit our ability to be a world-class business school, we contend the FBA has been underfunded in the past by 20-25% because we have not been able to retain an appropriate percentage of the premium fees we generate. This point was acknowledged in our EQUIS accreditation which stated “there is some question whether the faculty portion of the revenue split is sufficient to cover its marketing and recruitment, administrative and teaching costs”. Failure to achieve adequate funding will not only threaten our programs and accreditation, but it will restrict funding for our PhD program, research centres and other research initiatives that are vital for maintaining world class scholarship levels. Perhaps more importantly, the current division of premium fees was arrived at a time when faculties were not responsible for market differentials. Even now, the FBA faculty complement is almost 20% below that envisioned in the last three year academic plan submitted in 2006. Together with past budget cuts, the result has been undergraduate class sizes that are significantly above the University average (2007/08 IRP numbers for average class sizes indicate that lower division class size is 54% higher and 36% higher at the upper division). Proposed future budget cuts will not only exacerbate this problem but will also threaten our ability to recruit and serve new students and mount new programs. Continued erosion of the FBA budget through cost cutting will result in reduced activity at the graduate level.
that will harm not only the FBA but will also see premium fee revenues reduced for the University.

The FBA’s strategic decision is to pursue new growth opportunities, primarily at the graduate level. This option will allow us to maintain necessary services, but will require new faculty and is conditional on the FBA retaining a higher percentage of premium fee revenues. A second option, large cost reductions, was considered and rejected. Such cuts would reduce in a significant way our ability to recruit excellent students and to offer competitive student services, particularly at the graduate level. This option would jeopardize our AACSB and EQUIS accreditations.
2. Faculty Core Activities

As a professional school, we must provide an education that prepares students to enter the business world. This means we must provide our students with specialized knowledge and skills demanded by the business community, professional accrediting associations (e.g., CA, CGA, CFA, CMA), and academic accrediting associations (EQUIS and AASCB). We are able to meet this demand by emphasizing experiential and applied learning (while maintaining a high level of theoretical emphasis), and by providing career management services. The FBA also competes against a large number of business schools for the best students and resources. This requires a significant investment in recruitment and student services. Of necessity, we have to provide new and different learning opportunities for our students in order to remain competitive. In order to preserve reputation and ranking, we must advertise our programs, provide career centre services, and undertake activities that are vital for competing in the business school world. All of these are expensive services that the FBA graduate premium fee programs fund.

To achieve our teaching objectives, a large proportion of our operation is self-funded through premium fees and executive education. This is a different model from the more traditional SFU Faculties and departments. Our graduate programs and our Learning Strategies Group (LSG) are all fully self-funded. Our share of premium tuition fees are the resources the FBA uses to offer the learning experiences required to graduate excellent students.

FBA faculty members are increasingly publishing in highly ranked journals. The FBA research culture is strong and growing. Our newest faculty hires are dedicated researchers who are working with, and being mentored by, more senior FBA members resulting in research synergies. Both the application and success rates for SSHRC funding have increased over the past decade and are now above the national average. Research informs FBA faculty members' teaching and community interactions. Continued research support is important to the health of both the FBA and the University.

Community outreach is an important component of FBA activities. We have initiated local outreach activities using community-based projects as a learning method in various courses. Outreach is also demonstrated by our research centres programs such as the Centre for Corporate Governance and Risk Management’s Directors’ Program and the CMA Centre for Strategic Change and Performance Measurement web site.
The FBA core activities, therefore, fall under three headings: research, education and teaching, and learning enhancement. All of these core activities are essential to the operation of a successful professional business school.

2.1 Research

A. Research Activities

- Individual and group research projects
  - Our publications in elite business journals have increased over time and we now rank among the top 100 business schools in the world (source: University of Texas – Dallas, Top 100 World Wide rankings).
  - Strategic research plan focuses on four key research areas:
    - Globalization and Emerging Markets,
    - Knowledge, Innovation and Technology,
    - Society, Environment and Governance, and
    - Risk and Asset Management.

- Funded centres created to support research agenda
  - CIBC Centre for Corporate Governance and Risk Management
  - CMA Centre for Strategic Change and Performance Measurement
  - Centre for Global Asset and Wealth Management
  - Centre for Global Workforce Strategy
  - Centre for Workplace Health and Safety (subject to Senate approval)
  - Jack Austin Centre for Asia-Pacific Business Studies (subject to Senate approval).

- Funded chairs in priority research areas
  - CRC Chair, Ming and Stella Wong Chair, Weyerhauser Chair, RBC Technology and Innovation Professorship, Dennis Culver Executive MBA Professorship, North American Business Studies Professorship, University Professorship.

B. Faculty Development and Support

- Associate Dean, Faculty Development
- Grants Facilitator
- Research Committee
- Teaching Effectiveness Chair and Committee
- Research Honour Roll (senior and junior scholars)
- TD Canada Trust Teaching Awards
2.2 Education and Teaching

A. Undergraduate Business Education
- BBA degree
- Service courses in Strategy, Law, Communications, Ethics, and Statistics and Decision making
- Experiential and student development opportunities supported through faculty and joint FBA/SFU based student services
  - International exchanges
  - Summer programs
  - Field schools (incoming and outgoing)
  - Business Co-op Education
  - Business Career Management Services
  - Business leadership and engagement opportunities through clubs and organizations, and business case competitions.

B. Graduate Business Education - Segal Graduate School of Business
- PhD Program
- Executive MBA Program
- Masters of Business Administration
- Management of Technology MBA Program
- Financial Risk Management Masters Program including the option of Global Asset and Wealth Management
- Graduate Diploma in Business Administration (online program)

C. Executive Credit and Non-Credit Education: Learning Strategies Group (Appendix 1 outlines LSG’s financial contributions.)
- Executive education open enrollment programs (non-credit): Health Management Development Program; CIOCAN Leadership Development Program, Directors’ Education Program
- Closed enrollment executive education programs and consulting for private clients (non-credit)
- Closed enrollment Graduate Diploma in Business Administration and Executive MBA cohorts.

D. Recruitment: Marketing and Communications Group
- Brand development
- Integrated marketing plans
- Brochures and collateral materials
- Recruiting activities
• Web site development and maintenance

E. Technology Support
• IT technicians for Burnaby and Segal to support teaching and research of faculty members.
• Student labs

2.3 Learning Enhancement
A. Undergraduate Student Services
• Student Affairs Office
• Student Clubs
• Case and Business Plan competitions
• Community projects
• Student Exchange/ International Student Support Coordinator
• International Affairs committee

B. Career Management Centre (Graduate and Undergraduate)
• Advising and coaching
• Career/professional development seminars
• Career opportunity listings (direct employer development and through purchased databases)
• Employer development, student engagement, and feedback
• Operations (technology; communications, databases)
• Event management / support
• Alumni services.

C. Advancement & Alumni Affairs
• Grow FBA profile in Business community which will lead to development opportunities.
• Foster relationships with FBA alumni groups.
3 Planning Assumptions

The key assumptions in developing this plan are:

- Demand for undergraduate business education will continue to grow, far outstripping the FBA’s ability to meet that demand under current University policy. We assume that; the FBA enrollment quota will remain fixed at 10% of the university total and will be rigidly enforced. (See Appendix 2 for details.)

- Demand for graduate programs at the Master level will continue to increase with proper marketing efforts, but not equally in all programs. (See Appendix 3 for details of graduate programs.)
  - Local demand for the EMBA and MoT (both part-time) programs will likely remain stable, offering limited possibility for increased revenue in these programs unless they become international or offered as closed enrollment programs.
  - There is unfilled demand for the MBA program with a second cohort possible for 2010, but this will require more faculty and staff.
  - The FRM has reached its capacity. The FBA is in the process of revamping the program to position it for potential fee increase.

- Other revenue generating possibilities exist but are uncertain. Examples include new premium fee graduate programs in areas such as accounting, and business intelligence/competitive analytics which could be housed at Segal or Surrey.

- Demand for the GDBA program will increase moderately.

- The PhD program is at steady state (25-30 students) but is unfunded.

- To maintain the complement of faculty positions set out in the 2007-2010 Three Academic Plan, the FBA needs to recruit a minimum of 14 CFL positions, or the equivalent (Professors of Management Practice).

- Professors of Management Practice and increased use of adjunct professors could help in meeting FBA teaching and administrative requirements.

- New revenue generating possibilities in executive education are possible, as the Learning Strategies Group continues to be re-organized. (See Appendix 4 for details of historical contributions.)
4 Strategic Influences *(Provided in point form)*

4.1 Opportunities

1. Possible program expansion:
   a. Expand MBA program at Segal to two cohorts.
   b. Explore possible other new premium fee graduate programs at Segal. (See details of graduate programs in Appendix 3.)
   c. Possible graduate program in Surrey (Business Analytics).
   d. Institute an international MoT program.
   e. Enter into international partnerships to share faculty and offer new programs.
   f. New multidisciplinary programs with SFU Faculties (in particular Applied Sciences, Health Science and Environment).
   g. Expand executive education programs.
   h. Implement cost recovery of undergraduate career management program, including a required, additive credit, fee-based career preparation program.
   i. Unify continuing and executive Business education through the Learning Strategies Group (LSG).

2. New research centres, particularly in innovation and technology, and global mining.

3. Joint or dual degrees with international universities at the undergraduate and graduate programs.

4. New or revised undergraduate programs in business technology management, and entrepreneurship.

5. Restrict undergraduate enrollments and increase undergraduate brand by making entire BBA program an honours program. (See Appendix 2 for details of undergraduate program.)

6. Falling enrolments for University may provide reason to expand FBA enrolment from 10% to 12% of the University to ensure more revenue (we do not see this as an opportunity, but the university might)

7. Initiate new Introduction to Business course. (See Appendix 1.)

8. Revision of Undergraduate Minor in Business to provide recognition of courses taken by non-business majors in FBA. (See Appendix 1.)
4.2 Threats

**Internal Challenges/Constraints coming from within the University**

1. Provincial budget allocations to the University and effect of budget on FBA
   a. Continued budget cuts to FBA likely to decrease services to FBA students, resulting in lower student satisfaction ratings, and ultimately loss of reputation of the Faculty at all levels.
   b. Continued budget cuts will lead to serious FBA faculty workload issues (larger than university average classes sizes; high proportion of international students) and will undermine morale resulting in faculty leaving for better funded positions.
   c. Inability to replace faculty members who resign or retire due to loss of funding.
   d. Inability of FBA to retain a sufficient portion of premium fees to cover costs of new programs and attract new faculty.
   e. Rising class sizes is harming morale and may make it difficult to retain faculty.

2. Competition between FBA and other University units
   a. Internal competition for attracting endowments and other donations.
   b. Limited ability to communicate directly to FBA alumni.

3. FBA spread over three campuses
   a. Resulting in a loss of contact and collegiality among FBA faculty members.
   b. Lack of critical mass of faculty members at Surrey to make it a sustainable FBA operation.

**External Threats coming from outside the University**

1. Competition from old competitors (e.g., UBC) who have greater funding and support for students inside and outside the classroom.
2. Competition from newly created universities (e.g., Kwantlen).
5 Self Assessment

5.1 Strengths: define areas that will be retained as major research and teaching foci for the Faculty

1. The FBA is a high quality Business school
   a. AACSB and EQUIS accredited: one of only 60 business schools that have attained both (or less than 1% of the 5,000+ business schools)
   b. Research productivity: have made appearance among top 100 in some university rankings (e.g., Top 100 World Wide Rankings from University of Texas—Dallas)

2. High demand and recognized undergraduate and graduate programs
   a. Premium fee revenues
   b. Attracting high quality students
   c. Undergraduate Business program listed in top Five in Canada by 2009 Corporate Knights Ranking.
   d. EMBA listed as among top 50 in the world by CEO Magazine.

3. High student satisfaction and engagement
   a. Career Management Services. – see below as well.
   b. Program Management team.
   c. Student engagement opportunities (e.g., business case competitions, student clubs, community-based projects).

4. Wide internal consensus on future strategic direction.

5.2 Weaknesses: define areas in research and/or teaching that are of secondary importance to the Faculty; define areas of research and teaching that could be amalgamated for greater effectiveness and focus

The following areas are weaknesses of the present structure. These must be addressed if the FBA is to continue to flourish in terms of research output and to attract the best students to our premium fee programs.

1. Three campus operation negatively influences collegiality, cohesiveness, research output and effective use of limited teaching resources. Without additional revenues, will need to limit participation at Surrey.

2. Inability to meet demand from students for more courses especially at the undergraduate level. We are implementing a 100% broad-based qualifications entry system to control
admissions to BBA and are considering whether to make the entire BBA an honours program. (See Appendix 2.)

3. Shortage of CFL faculty will jeopardize accreditation. Need to find ways to enhance our CFL complement.

4. Limited ability to raise external, private funds to support research (chairs, fellowships) and recruitment.

5. Career Management Services team that has a lower relative staff/student ratio than other Canadian Business Schools. (See Appendix 5.)

6. Faculty Objectives

6.1 FBA’s Objectives for 2010 to 2013:
1. Maintain and encourage excellent research by our faculty members under our four research themes. These research themes are all linked to the community through research centres and academic programs.

2. Grow our graduate programs in areas where there is demand while continuing to adapt and update these programs to meet our communities’ needs. In particular, add a second cohort to the MBA and re-design the FRM.

3. Expand our activities in executive and custom education. Launch an EMBA for first nations.

4. Recruit faculty to meet new programs needs and to augment our research in focus areas, with external funding where possible.

5. Move to develop a new category of participating FBA members, Professors of Management Practice.

6. Move to a learning objectives based model of assessment for our undergraduate and graduate programs while enhancing students’ learning experience (meets AACSB and EQUIS accreditation requirements).

7. Move to limit undergraduate enrollment to match the University’s targets for FBA.

8. Work with the Faculties of the Environment, Applied Science and Health Sciences to hire joint faculty to increase our multidisciplinary research in our four research themes and to offer new programs.

9. Create and fund new research centres in innovation and technology, and global mining.

10. Be among the first North American schools to create an undergraduate/graduate program that is compliant with the
Bologna Accord and use this to expand the international options available to our students.

11. Introduce a revised undergraduate minor in business that would be more accessible to all SFU students

12. Introduce an undergraduate Certificate in Corporate Social Responsibility and Sustainability.

**NOTE:** an additional goal underlying all of the above is to renegotiate the current division of premium fee revenues.

The FBA Objectives arise directly from the FBA’s Mission, Core Values and Strategic Focus (Exhibit 1). As well, the objectives are related to the VPA’s Academic Vision (Exhibit 2).

The FBA is committed to excellence in research that is at the same time relevant to our community and informs our teaching. The four FBA research themes (Innovation and technology; Globalization and emerging markets; Society, environment and governance, and Risk and asset management) were chosen because of their relevance in the 21st Century and to the growth of the metropolitan Vancouver area. We have carefully linked the FBA to both our local and international communities. The research themes also lend themselves to collaborative research and programs with other faculties.

The FBA objectives for the graduate and undergraduate programs will help the FBA to meet its mission of educating and inspiring “the founders, leaders and managers of organizations that are internationally competitive, locally responsive, and sustainable.” This clearly overlaps with the VPA’s Academic Vision in terms of meeting the needs of the community and enabling “students to reach their goals and potential.” The FBA focus on helping our “students to become thoughtful, principled and responsible leaders” will help our students to meet their goals while becoming the “ethical, responsible and informed citizens” envisioned in the VPA’s Vision. Since the FBA recognizes that its markets are local but with international connections, our graduate and undergraduate programs have and will continue to have “a global perspective with a local orientation” while continuing to be “an active and highly valued partner in the social, cultural and economic life of the community.”

The fourth objective must be met to continue delivering a quality educational experience to FBA majors (see Appendix 2 for more details). With class sizes that are higher than the University average class sizes (at both the lower and upper division) and premium tuition, the FBA is challenged to provide an educational experience that is equivalent to the experience of students in other units where class sizes are smaller. FBA undergraduate
students deserve an “intellectually stimulating and culturally vibrant environment”.

The FBA objective to work with the Faculties of the Environment, Applied Sciences, and Health Sciences to hire joint faculty fits with the FBA core values and strategic focus. As well, it fits with the VPA Vision to be multidisciplinary in our research and teaching. Such joint appointments will enhance the FBA’s ability to meet the needs of our communities for exposure to challenging, new and novel ways of looking at the world of business.

The introduction of Professors of Management Practice is an opportunity to complement the FBA CFL faculty members by engaging leaders from business, government and nonprofit organizations to share their expertise with FBA students. These leaders represent opportunities to create the “intellectually stimulating and culturally vibrant environment” the VPA’s Vision promotes. Additionally, Professors of Management Practice will serve as a means of interacting with members of the community while being “effective, efficient, and innovative” in the FBA’s approach “to teaching, learning, research, service and administration.”

6.2 Reaching and Maintaining the 2007-2010 Recruitment Plan

Our faculty complement in Fall 2006, was 74. We had 17 unfilled faculty positions and expected as many as nine retirements meaning the FBA needed to hire up to 26 people to achieve the faculty complement of 91 envisaged in the previous three year plan. As of the beginning of the spring 2007 semester, we had a faculty complement of 80. Subsequently, we have lost three faculty members (two retirements and one resignation). We now have a faculty complement of 77 and this at a time when we have some of the largest undergraduate class sizes in the University and growing graduate class sizes. This is a threat to our ability to charge premium fees. Class sizes simply cannot grow larger without affecting faculty research output and student satisfaction. For the FBA to grow at the graduate level and increase premium fee revenues, we must add faculty. To achieve the planned 2007-2010 growth and to maintain our present complement we need to hire a minimum of 14 more faculty members or the equivalent.

In addition, the FBA has identified several areas where new faculty members are required to meet our research goals. The primary need is in the area of innovation and entrepreneurship where we intend to augment our research capabilities. However, we also need at least two, and possibly three faculty members in this area to meet the anticipated growth in demand from students, and to engage in program and research collaborations with other parts of the University.
To meet the required faculty for both research purposes and instructional needs, the FBA will use a three pronged approach. These prongs are new continuing faculty, Professors of Management Practice and adjunct professors. To finance this approach, funding needs to come from three sources: recovery of previously authorized positions that have reverted to the VPA including the associated salaries; renegotiation of the current division of premium fee revenues; and initiatives to raise resources for professorships.

A. Continuing Faculty (CFL) Positions
The FBA must hire faculty members into previously authorized CFL positions that have reverted to the VPA. The FBA will also need to recover the funding for these positions from the VPA. Without the ability to increase our CFL positions, the FBA faces several threats. The FBA faces the real possibility we will be unable to expand our existing graduate programs or to expand into new graduate programs where there is growing demand. The FBA must go through AACSB maintenance of accreditation in the Fall 2010. The AACSB review team will look at FBA statistics such as CFL/student ratios and the number of sessional or part-time appointments compared to CFLs. To maintain AACSB accreditation, the FBA must hire sufficient CFLs to meet its program needs.

B. Professors of Management Practice
In addition to increasing the FBA CFL complement to the 2007-2010 levels, the FBA supports the creation of a new position type. This position is not meant as a substitute for CFL positions. Instead, this position would serve to enhance the FBA’s ability to upgrade our sessional staff by hiring better qualified, internationally recognized individuals. On initial appointment these positions would be filled for up to three years by individuals who would provide the FBA with the services of expert managers to teach and supervise our students. Professors of Management Practice would help the FBA in its maintenance of both AACSB and EQUIS accreditations.

C. Adjunct Professors
The FBA can also meet some its faculty needs through the increased use of international faculty drawn from other universities. However, these positions can be expensive to attract and will require more funding for the FBA.
Exhibit 1
FBA Mission
By creating and communicating powerful ideas, we educate and inspire the founders, leaders and managers of organizations that are internationally competitive, locally responsive, and sustainable.

Core Values

Responsible Leadership. We value a learning environment that engages, inspires and challenges our students to become thoughtful, principled and responsible leaders.

The Power of Ideas. We value the development of creative and innovative ideas. We support a collaborative research culture that sustains excellence and promotes external relevance.

Global Perspective. We value the multi-cultural nature of our location. It inspires our participation in the global exchange of ideas that connect our community to the world.

Responsive Engagement. We value relationships with our stakeholders that help them achieve their goals. We endeavor to contribute to the emergence of metropolitan Vancouver as a centre for knowledge creation and innovation.

Diversity. We value an environment that respects and embraces diversity in all its forms and believe that diversity is a source of innovation.

Collegiality. We value an academic and work environment in which people treat each other honestly, courteously and with each other’s best interests in mind. We value pluralistic, inclusive decision-making.

Strategic Focus

Research
Our commitment to research gives us a competitive advantage. We conduct future-focused research of international significance that is relevant to both the academic and business communities. We focus on selected areas: Globalization and emerging markets, Knowledge, innovation and technology, Society, environment and governance, and Capital and risk management.

Students
We educate, engage and inspire the responsible leaders of tomorrow. Our students value learning that is relevant to a rapidly changing and complex world, and that meets their own unique learning and life goals.

Programs
In collaboration with our stakeholders and partners, we design and deliver distinctive, relevant, and responsive programs. Our graduate programs target the needs of specific demographic and industry groups. Our undergraduate program combines business foundations with opportunities for engaged and challenging learning outside the classroom. In every program we bring cutting edge knowledge and global best-practice into a teaching environment that provides unique learning opportunities for every student.

Markets
Our programs serve primarily our local market, but attract students globally. We build on strong linkages to both our local business community and the international academic community to support the growth of a competitive regional knowledge-based economy. We serve in particular as an intellectual gateway to the Asia Pacific region.
Exhibit 2

VPA Academic Vision

- Commitment to excellence in teaching, learning, research and community service in a wide spectrum of academic disciplines across our 8 Faculties, with a particular emphasis on multidisciplinarity and the ability to anticipate or respond to emerging areas of higher education demand.

- Supports scholarship as the creation, advancement, application, transmission and preservation of knowledge, and the stimulation of critical and independent thinking.

- Enables students to reach their goals and potential and become ethical, responsible and informed citizens.

- Employs effective, efficient, and innovative approaches to teaching, learning, research, service and administration.

- Creates an intellectually stimulating and culturally vibrant environment.

- Has a global perspective with a local orientation and is an active and highly valued partner in the social, cultural and economic life of the community.

7. 3 Year Growth Scenarios (also see 9.2)

The FBA has not completed this section in detail. Any anticipated revenue growth (e.g., resulting from the introduction of new premium fee graduate programs, executive business education via LSG’s efforts or fee-based revenues from CMC) will be used to maintain or enhance our existing programs and to meet the anticipated 10% budget cut.

The only possibility for any further growth would come through joint appointments with Faculties that are permitted to grow (e.g., Health Sciences and Environment). As noted in the objectives section we will work with these two Faculties to attract and hire excellent researchers that will serve our mutual needs.
8. **Worst Case Scenario for 2010/11** (also see 9.3)

The FBA considers a 10% budget reduction over three years not as a worst case scenario, but rather as the most likely case scenario. As noted above, the FBA considered a pure cost reducing strategy and rejected it. Such a strategy would result in a staged withdrawal from graduate courses at Segal, with loss of revenues and reputation. As a consequence, the FBA has chosen a mixed strategy.

If the FBA is faced with a 10% reduction, then we will take two types of action. First, we will make targeted cuts in expenditures. In particular, we will reduce our presence to Surrey. While we will continue to offer courses, it will be necessary for us to have as little staff and faculty presence as possible. Additionally, we will need to reorganize staff duties at both Segal and Burnaby. This will mean that as people leave, jobs will be collapsed and people will not be replaced. All three of these actions will result in cutting positions.

On the revenue generation side, the FBA will institute measures to charge user fees for certain services (e.g., Career Management Centre User Fees), and the Learning Strategies Group will be asked to increase its financial contribution. At the same time FBA Advancement must begin to raise funds from the external community. Finally, new premium fee graduate programs will be introduced and efforts will be made to increase enrollments in existing programs.

This strategy involves some risk as it is not certain that revenues can be raised, owing to either market uncertainty or bureaucratic complexity.
9. **Financial Plan** *(Template provided.)*

A 10% decrease from our 2009/2010 base budget, **excepting revenues we generate**, amounts to $1,500,000 (spread over the three academic years as 4%, 3% and 3%). To meet this cut by the end of 2010/11, we will have to take two actions: cost cutting and revenue generation.

Possible Cost Cutting Actions:
- Cut most of Surrey Undergraduate Program Staff to one staff member only $145,000
- Reorganization of Segal and Burnaby staff resulting in three less positions 155,000

**Total Possible Cuts in Expenses** $300,000

Possible Revenue Generation Actions:
- Institute Career Management Centre User Fees $300,000
- Learning Strategies Group Education Fees 200,000
- Advancement: Fund Raising for Three Year Period (Plan includes Dean’s Circle Initiative) 200,000
- Graduate Programs: New/Expanded programs 500,000

**Total Possible Revenues** $1,200,000

**Total of Cost Cutting and Revenue Generation** $1,500,000

*NOTE: the assumption underlying all of the above is that the FBA will renegotiate the current division of premium fee revenues.*
10. **Communication**

   Explain how the planning process will be communicated effectively throughout the Faculty, and how broad participation will be achieved.

   The three year plan has been communicated throughout the Faculty to both faculty and staff. Input has been sought and included in this report. The steps taken to develop and communicate this plan were:

   2. Meeting of P&P members held at Segal July 23, 2009 to examine the FBA’s future plans, FBA’s budget situation and the implications for the FBA’s future.
   3. The first draft of this three year plan was completed on September 1, 2009.
   4. Plan circulated to the P&P members for discussion at the September 17, 2009 meeting.
   5. Revised draft of three year plan was circulated prior to a September 22, 2009 Faculty meeting for discussion by faculty members and staff.
   6. Final draft of plan completed following revisions arising from the Faculty meeting.
APPENDIX 1

Details of Desirable Undergraduate Curriculum Changes

Learning Assessment – Must be done.
- In order to meet our AACSB and EQUIS reaccreditation requirements, the faculty will be
  o formulating its learning objectives for each program
  o identifying specific courses where each objective will be taught and assessed
  o creating and selecting measurement /assessment instruments
  o tracking and evaluating those outcomes
  o disseminating the results, recommending and implementing improvements

Learning outcomes will be developed and measured for all programs. This will require dedicated resources.

Some possible curriculum changes related to our Faculty objectives (subject to budget constraints):
- Global perspective
  o Require an international business course of all BBA graduates (we currently offer several International Business courses and courses in international marketing, finance and human resource management so we would not necessarily need to create a new course, but we would increase enrollments in existing courses.
  o Create a combined Honours BBA/Masters of International Management in conjunction with a European partner such as EM LYON that would involve include significant components of study in Europe and China and possibly India with students from other universities.
- Responsible Management (Ethics, Sustainability and Corporate Social Responsibility)
  o Launch an optional Certificate in Corporate Social Responsibility and Sustainability that includes courses within the faculty and from other faculties as well as an additional experiential component achieved through reflection and analysis of work placement, volunteer activity or research.
- Revise and re-launch the Entrepreneurship and Innovation concentration
- **Revision of the undergraduate Minor in Business:**
  (for students not admitted as Business Majors) to reduce the requirements from 43 units to something that captures the breadth of the lower division business courses required of non-business students who wish to enter the faculty already. Business ethics, law and communication would not be included as the faculty does not have the resources to expand these offerings to all the potential students who might wish to complete the minor.

- **Introduction to Business course:**

  We plan to introduce a new required first year course “Bus 201: Introduction to Business”. It would provide a broad level overview of the field of Business Administration that would introduce Business and non-business students (particularly in Computing, Engineering and SIAT) to the purpose and core concepts of management of business and non-profit organizations. It would help students to integrate the concepts learning in later courses or just give them the basics if this is the only course they take. Currently, we have no course that provides this integrative function until students reach their last year although a pilot course will run as Bus 130 in Spring 2010. However, to launch a required Bus 201 would require an additional 1500 seats (or 150 AFTE’s or about 7 sections at a cost of over $120,000 including TA’s and additional instructor charges). Our tentative funding model for Bus 201 is to reduce the number of sections of other open enrollment courses.
APPENDIX 2
Undergraduate Program Details

Undergraduate Program
Undergraduate Enrollments:

AFTE forecasts
FBA AFTE’s have increased steadily during the last 3 year planning period (7% to 12.5% increases). We forecast 09/10 (fiscal) AFTE’s of 2,657, an increase of 10% over 08/9 AFTE’s (based on our course enrollment planning). Despite limiting direct admissions in fall 2009, we project FBA AFTE’s will not begin to decline until that “cohort” reaches 60 credit hours in 11-3. This means the impact of the relatively larger intake cohorts from previous years in our upper division courses will continue until at least 12-3.

Our projected headcount of students at the 200 level will not decline substantially until 10-3. However starting in 10-3 headcount will increase by over 100 students at the 300 level and at the 400 level it will remain high and take a further jump in 11-3.

It is critical to understand that AFTE’s and headcounts at different course levels have very different cost implications. Even if AFTE’s were to remain constant, our costs of instruction would rise until at least 12-3 due to the composition of those AFTE’s. Average class sizes in the faculty are currently (09-2 term): 190 at the 200 level; 80 at the 300 level; and 30 at the 400 level. We expect these to increase slightly at all levels as we have increased class sizes wherever possible.

Undergraduate enrollments in the FBA are complicated by the fact that there are 3 sources of enrollment with very different implications for education delivery by the Faculty. The first two sources of enrollments, which are the focus of SCEMP targets, are domestic and international direct high school admits. These students, in their first 60 credit hours take 19 units in required lower division courses offered by the FBA in large sections of about 250 students each (except at Surrey). The other 41 units are taken outside the Faculty. These two groups of students have very different funding implications for the University and place different demands on the University and Faculty for support.

- The third enrollment source comes from internal SFU transfers, joint majors and, to a more limited extent, college transfers. These students enter the faculty after their first 60 units are complete (however most will have completed the required lower division courses at SFU with the direct admit students). The transfer students are not part of the SCEMP targets
for the FBA since these students were originally admitted by other Faculties. Thus, first year enrollments in other Faculties include a group of students who ultimately end up in the FBA. While proportions vary from year to year, on average about half of the students newly admitted to the FBA each year are transfer students into our upper division courses. Lower division AFTE’s in Business courses include large numbers of students from other Faculties (approximately 50-60%) completing lower division requirements for eventual transfer into the FBA or personal interest.

The implications are:

- Enrollment management for the FBA involves managing students from different sources entering the program at different levels (lower and upper division)
- Not only are upper division courses much more expensive to mount given that average class sizes decline from approximately 200 (at the 200 level) to 80 (at the 300 level) and 30 (at the 400 level), but half of our total enrollments are admitted at the upper division from among current SFU students.

The FBA continues to receive more applications at the undergraduate level than it has space or resources to educate. Our admission average of 90% is the highest in the University. Even at that high cutoff the FBA exceeds the targets set by SCEMP. Due to the method of enrolling students based on a cutoff GPA of 90% from secondary school, we have little control over the numbers admitted and enrolled each year.

The FBA plans to enhance our ability to control enrollment numbers and attract the best and most suitable students to the program by moving to 100% broad-based admissions for direct admits by Fall 2011.

The FBA further plans to limit upper division enrollments by curtailing internal transfers and encouraging joint majors by setting even higher GPA requirements for transfers and extending the broad-based criteria to include transfers. Internal transfer GPA’s will likely be increased to at least 3.0 in January 2010 (and will be based on required Business transfer courses only) and will be increased further to achieve desired reductions of 50% of the current number of transfers. Joint majors place somewhat lesser demand on FBA resources and we will investigate ways of encouraging more use of joint majors and a revised business minor as a way of meeting at least some of the demand for business education.

Although our ability to attract students to Surrey has been a challenge, it has been improving through the efforts of our FBA Surrey recruiting staff. In addition, for Fall 2009, a trial BusOne NSA entry pathway has led to stronger
Business@Surrey enrollments. The FBA plans to formalize the BusOne first year pathway for Business@Surrey for Fall 2010. Our strategy, which we intend to continue, is to allow Business students from either Burnaby or Surrey to attend courses offered on both campuses.

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<td>Transfers**</td>
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Notes:
*Direct admit high school (lower division entry)
**Transfer SFU / other (upper division entry)
The FBA plans to move as quickly as possible to meet the 10 percent undergraduate enrolment targets as set by Senate and the University. This will be accomplished by ensuring that no more students are admitted to the Faculty than are funded. This will allow more resources to be devoted to graduate programs. From past experience, we know net revenue growth lies with the graduate programs and not with the undergraduate programs. It should be noted, however, that as other academic units continue to fail to meet their enrollment targets, the University’s aggregate budget situation may be negatively affected.

---

**FBA undergrad enrollment headcount "projections" by level and term**

Note: does not equal IRP headcounts - assumes 4 years so under estimates total number but errors are the same across scenarios

Note: average number of 400 level students over 3 terms = approx number of seats in 478 over three terms

**Current scenario**

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**Scenario 2**

Cut transfers 50%

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**Scenario 3**

No transfer 10-1 and 10-2

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By 2013 the curriculum will be organized in such a way that students will be exposed to a range of learning experiences that prepare them for future learning and future employment.

The FBA already provides a very broad range of learning experiences in its program. In our review of curriculum prepared for EQUIS accreditation, learning experiences included, in addition to lectures, seminars, class and small group discussions, problem set assignments many project based opportunities for students to interact with real and virtual businesses as well as create plans to develop their own new ventures. Case studies, computer simulation “games”, client based projects and business plans, management of a real investment fund, management and implementation of social enterprise projects, development and sale of new products as well as primary and secondary research projects are common. The undergraduate program is currently developing an inventory of the experiential learning activities currently employed in the faculty. The faculty will be exploring methods of diffusing these methods to an even greater degree within the faculty. Ideally, the curriculum will ensure that students have at least one and more than one of several types of learning experiences.

By 2013 the curriculum will be organized to provide a clear route or routes through the program, with predictable course offerings.

The FBA has implemented a 6 semester plan that ensures smooth course pathways and it also currently publishes that plan for 2 semesters out to students. The system integrates course and faculty scheduling, book orders, exam planning, contracts, TA’s, enrollments, course evaluations. It has undergone recent upgrading to better integrate 3 campuses and graduate programs. It links into the FBA budgeting system to project and reflect instructional costs by program and area.
Graduate Programs
Graduate Enrollments Existing Programs:

The highly competitive market for graduate students combined with the fallout from the recession requires an ability to react quickly, modifying programs to meet the market's needs. In particular, our Finance programs have been combined to streamline the offerings and better match the demand in the market place. GAWM is now an option within the FRM, rather than a separate MBA. This combination will continue for the 2010 intake while planning for a revised Finance program is conducted, with a 2011 start date for the revised program.

Since the last three-year plan, the full-time version of the MoT MBA has been eliminated due to relatively weak demand. Efforts have been refocused on the part-time version of the program and demand has been fairly strong in spite of a weaker economy, which hurts part-time programs due to the negative impact the economy has on corporate support for graduate training.

The EMBA has been modified to ensure that it stays in-sync with the market. Demand is expected to increase as the economy improves over the next three years.

The full-time MBA started strong in 2007 and demand for the program continues to increase. A second cohort is expected in 2010. Demand, particularly from the international market, is strong in the Financial Risk Management program. The revised Finance program hopes to build on these strengths moving forward.

Demand for the online GDBA increased when the full-time MBA provided a more logical path to a terminal degree.

Finally, the PhD program has reached a steady state, which is about 25 – 30 students. This program receives very little support from the university and is funded out of cashflows generated by the Faculty's other graduate programs. As budget cuts continue to be absorbed by the Faculty, continued support for the PhD program becomes more difficult to sustain.

There are numerous profitable growth opportunities for our graduate programs but growth is severely constrained by two factors: limits on faculty recruitment and growth; and a regressive revenue-sharing arrangement with the university that limits our ability to nurture and sustain new programs past
the first year. With these limitations it is critical that growth is highly focused on programs that match our faculty profile, and that best match our long-term vision.

### Graduate Programs:  08/09  09/10  10/11  11/12  12/13

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### Graduate Program Curriculum Goals:

**By 2013 each unit will define the outcomes of its graduate program in terms of:**

- **Core disciplinary knowledge**

  The MBA programs each provide core skills in Marketing, Finance, Entrepreneurship, Management, Ethics and Strategy to their respective target markets. The FRM provides core skills in Financial Theory, Econometrics and other numerical methods, Derivatives and Risk Management. The PhD focuses on core research skills in the areas of theory development and empirical measurement mostly in the areas of Management and Organizational Studies, Marketing, International Business and Finance.

- **A range of skills that students will master**

  Students master different skills in the different MBA programs. The EMBA focuses on Strategy and Leadership for the seasoned managers that make up the cohort. The MoT focuses on transitioning scientists and engineers from technical to managerial roles within a technology environment. Specific course are taught in Product Development, Innovation, Regulatory Affairs in the Biotech industry and Project Management. The MBA offers a broad set of skills to relatively young and inexperienced individuals with limited business backgrounds but also includes courses in Sustainability, New ventures, Emerging Markets, Negotiations and Cross Cultural Management. The FRM program focuses on highly quantitative Financial Risk Management techniques and tools in addition to training in Financial theory. PhD students master theory development and empirical measurement
before moving on to coursework and research in their specific, and individually tailored programs – under the supervision of their respective Faculty supervisors.

- **The key research areas in which graduate students will be supported**

  Masters students focus on applied research in their respective programs particularly in their final projects and essays. PhD students learn the theory development and research techniques to enable original research.

- **The relevance of the program to the community beyond the University.**

  Graduate training in Business is extremely relevant to the community. We have approximately 1500 alumni of our EMBA program alone in leadership positions in organizations throughout the lower mainland, in Canada and the world, including Government leaders like the Premier of BC and numerous CEO’s and other corporate leaders. The health of the BC economy in particular depends on the management skills imparted by our MBA programs. The Management of Technology MBA trains managers in BC’s critical technology sectors. And increasingly, with the success of our full-time MBA and FRM programs, Graduate programs in Business impact the global economy as graduates take up positions throughout the world.

**By 2013 each unit will have a funding plan for graduate students.**

PhD students are funded through a combination of support grants from their supervising faculty members, TA opportunities, research grants and from the Faculty itself in terms of direct aid and the offering of unfunded, small classes. MBA and FRM students receive support through targeted scholarships; but mostly the Masters’ level programs are premium fee programs that fund themselves, and other activities in the faculty and university. Development efforts will accelerate over the next three years to provide additional scholarship support for students and to enable the development of new and expanded programs.
APPENDIX 4
Financial Evaluation Of Learning Strategies Group’s Contribution TT
Simon Fraser University

Financial Contributions
SFU Business Faculty Income

The Learning Strategies Group programs make significant contributions to SFU Business Faculty’s regular income through promoting faculty expertise to secure additional teaching and consulting opportunities.

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<th>LSG Contribution to Faculty Salaries</th>
<th>Y/E March 2009 Total: $243,597.21</th>
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<tr>
<th>LSG Contribution to Faculty Salaries</th>
<th>Five Year 2005-2009 Total $2,111,043.39</th>
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Simon Fraser University Services

The Learning Strategies Group activities contribute to ensuring to the economic viability of a number of SFU departments.

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<td>SFU Meeting and Events / OTL 221,841.00</td>
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<th>LSG Financial Contributions Five Year 2005 - 2009 Total: $1,059,631.58</th>
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Total Five Year Direct Financial Contribution: $3,170,674.97
## Benchmark Analysis of Career Centre Staff and Student Numbers:

**Prepared Oct 5 2009**

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<th>SFU Business staff</th>
<th>UBC Sauder Staff</th>
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### Undergraduate

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</tr>
<tr>
<td>Employer Relations/Bus Devlp</td>
<td>2</td>
<td>3</td>
<td>1</td>
<td>2</td>
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<tr>
<td>Advisors</td>
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<td>2</td>
<td>3</td>
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<tr>
<td>Event/Marketing Coordinators</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
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<tr>
<td>Program Assistants</td>
<td>1</td>
<td>1</td>
<td></td>
<td>1</td>
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</tr>
<tr>
<td>Total Undergraduate Staff</td>
<td>3</td>
<td>7</td>
<td>4</td>
<td>4</td>
<td>6</td>
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</tbody>
</table>

**Total Staff of Career Centres:**

<table>
<thead>
<tr>
<th></th>
<th>SFU Business staff</th>
<th>UBC Sauder Staff</th>
<th>UofT Rotman staff</th>
<th>Western Ivey Staff</th>
<th>UofA Haskayne staff</th>
<th>York Schulich</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>10</td>
<td>20</td>
<td>16</td>
<td>14</td>
<td>7</td>
<td>17</td>
</tr>
<tr>
<td>Student Numbers Graduate 2008-2009 intakes</td>
<td>SFU Business staff</td>
<td>UBC Sauder Staff</td>
<td>UofT Rotman staff</td>
<td>Western Ivey Staff</td>
<td>UofA Haskayne staff</td>
<td>York Schulich</td>
</tr>
<tr>
<td>------------------------------------------</td>
<td>---------------------</td>
<td>------------------</td>
<td>-------------------</td>
<td>-------------------</td>
<td>--------------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>Incoming Graduate Full Time</td>
<td>121</td>
<td>120</td>
<td>270</td>
<td>170</td>
<td>55</td>
<td>260</td>
</tr>
<tr>
<td>Continuing Graduate Full Time</td>
<td>48</td>
<td>120</td>
<td>270</td>
<td></td>
<td>56</td>
<td>260</td>
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<tr>
<td>Part Time</td>
<td>68</td>
<td>100</td>
<td>245</td>
<td></td>
<td>60</td>
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<tr>
<td>Executive MBA</td>
<td>61</td>
<td>*</td>
<td>*</td>
<td>unknown</td>
<td>99</td>
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<tr>
<td>Total Graduate</td>
<td>298</td>
<td>340</td>
<td>785</td>
<td>170</td>
<td>116</td>
<td>619</td>
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<tr>
<td>Undergraduate</td>
<td>3,500</td>
<td>3,500</td>
<td>3,500</td>
<td>3,500</td>
<td>3,500</td>
<td>1,500</td>
</tr>
<tr>
<td>Total Grad &amp; Undergraduate</td>
<td>3,798</td>
<td>3,840</td>
<td>4,285</td>
<td>3,670</td>
<td>3,616</td>
<td>2,119</td>
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<tr>
<td>Total Student/Perm Staff Ratio</td>
<td>376</td>
<td>192</td>
<td>268</td>
<td>262</td>
<td>517</td>
<td>125</td>
</tr>
</tbody>
</table>

Other notes:

*EMBA: UofT (78) and Ivey (238) - but programs provide service and not CMC

Ivey has a Shanghai office with 1 Career Manager and 1 Assistant. It's a 12 month program

Haskayne has a new cohort of MBAs starting in January 2010 (doubling program)

Rotman MBA: "We have 270 2010’s and 270 2011’s. We do provide career services to part-time students; access to job postings and info sessions in their final year of study.

MFin and EMBA have separate career coaches and do not utilize our department or resources. MFin is roughly 35 per class for 09’s, 10’s and 11’s."