Key Research Findings

This analysis was based on the pre-determined criteria and measures listed below:

Section	Description	Measures
Student Demand	Includes an assessment of OCAS (2007 - 2011) enrolment data at other colleges in terms of mean growth rate with a specific focus on Fleming's direct competitors where appropriate (Georgian, Sheridan, Seneca and Durham) Trends in certificate, diploma, degree, apprenticeship and continuing education (where available). **Click Below to Access Full Source Document:** Fall Enrollment Trend	• Strong = Fleming enrolment growth is outpacing system and is equal to or greater than 3% • Moderate = Fleming enrolment growth is equivalent to system demand and is between 1.0 to 2.9% • Weak = Fleming enrolment growth is less than the system demand and is less than 1%
Labour Market	Includes projected employment rate growth based on a consolidation of various Ontario, Canadian, and US sources including HRSDC, Sector Council Reports US Bureau of Labour Statistics, and the MTCU Employment Profile.	• Strong = Between 5-6 positive labour market indicators • Moderate = Between 3-5 positive labour market indicators • Weak = Between 1-2 or no positive labour market indicators
Competitive Analysis	Includes the number of actual colleges offering the program as well as the ratio of applications to acceptances at Fleming compared to other colleges and specific comment about Fleming's direct competitors where appropriate (Georgian, Sheridan, Seneca and Durham) **Click Below to Access Full Source Document:** Fall Conversion Report	• Strong = Fleming conversion ratio is greater than 2 below the system • Moderate = Fleming conversion ratio is 1 above, below or equal to the system • Weak = Fleming conversion ratio is greater than 2 above than the system
Financial Analysis	Includes a review of Contribution to Overhead (CTO) for existing programs (2010-11) **Click Below to Access Full Source Document:** Costing Analysis	• Strong = CTO is greater than 35% • Moderate = CTO is between 30 - 34% • Weak = CTO is between 20 – 30% **No Contribution = 19% or less**

Key Research Findings

Key Performance Indicators	Includes KPI trends from the Key Performance Indicator Summary 5 Year Historical Overview KPI Data from Reporting Years 2008-2012. **Click Below to Access Full Source Document:** Key Performance Indicators	• Strong = Above system average in 6-7 indicators • Moderate = Above system average in 3-5 indicators • Weak = Above system average in 0-2 indicators.
Resource Analysis	Requires school level assessment regarding space, technology, capital equipment and human resources. Recommendations from recent Program Review Reports included here	

Key Research Findings

College Transfer (44700)

Student Demand[1]	• MODERATE

The following information consists of OCAS yearly student fall registration data as well as a mean growth rate and average student registration for each program under these categories:

Certificate

- Twenty-four colleges offer this program, including all four of Fleming's main competitors
- Fleming has a **4%** mean growth rate, slightly lower than the system rate of **5%**
- Out of the key competitors, Georgian has the highest mean growth rate **(137%)** and Seneca has the lowest **(-5%)**
- Overall, Mohawk has the highest mean growth rate **(206%)** and St. Clair has the lowest mean growth rate **(-22%)**
- Algonquin has the highest average registration with **1061 students** and Boreal has the lowest with **14 students**

[1] Registration data obtained from the Program Counts by Applicant Type Report (RPT0050P) in the OCAS Reporting and Analytics Cube December 7, 2011. Some programs/colleges may not be included because they were missing MCU codes in the OCAS dataset Prepared by Fleming Data Research (07-2012)

Key Research Findings

Certificate

Program: 44700 - GENERAL ARTS AND SCIENCE - ONE-YEAR														
	2007	2008	% Change (07-08)	2008	2009	% Change (08-09)	2009	2010	% Change (09-10)	2010	2011	% Change (10-11)	% Mean Growth Rate (07-11)	5 Year Average Reg. Students
ALGONQUIN	879	1033	18	1033	1072	4	1072	1124	5	1124	1195	6	8	1061
CAMBRIAN	26	20	-23	20	36	80	36	26	-28	26	32	23	13	28
CANADORE	31	47	52	47	40	-15	40	44	10	44	36	-18	7	40
CENTENNIAL	127	127	0	127	173	36	173	158	-9	158	144	-9	5	146
COLLÈGE BORÉAL	15	19	27	19	8	-58	8	8	0	8	21	163	33	14
CONESTOGA	83	69	-17	69	80	16	80	75	-6	75	93	24	4	80
CONFEDERATION	56	32	-43	32	35	9	35	40	14	40	42	5	-4	41
DURHAM	289	264	-9	264	313	19	313	347	11	347	367	6	7	316
FANSHAWE	696	639	-8	639	687	8	687	654	-5	654	674	3	-1	670
FLEMING	203	205	1	205	217	6	217	255	18	255	235	-8	4	223
GEORGE BROWN	146	155	6	155	149	-4	149	150	1	150	129	-14	-3	146
GEORGIAN	7	42	500	42	61	45	61	79	30	79	57	-28	137	49
HUMBER	352	473	34	473	442	-7	442	511	16	511	533	4	12	462
LA CITÉ COLLÉGIAL	98	98	0	98	111	13	111	81	-27	81	93	15	0	96
LAMBTON	22	20	-9	20	30	50	30	17	-43	17	18	6	1	21
LOYALIST	18				26		26	25	-4	25	27	8	2	24
MOHAWK	9	13	44	13	111	754	111	161	45	161	129	-20	206	85
NIAGARA	150	186	24	186	185	-1	185	202	9	202	157	-22	3	176
NORTHERN	24	13	-46	13	13	0	13	12	-8	12	14	17	-9	15
SAULT	34	33	-3	33	44	33	44	49	11	49	30	-39	1	38
SENECA	289	240	-17	240	261	9	261	255	-2	255	229	-10	-5	255
SHERIDAN	169	196	16	196	259	32	259	306	18	306	233	-24	11	233
ST. CLAIR	136	96	-29	96	90	-6	90	89	-1	89	43	-52	-22	91
ST. LAWRENCE	100	105	5	105	130	24	130	123	-5	123	178	45	17	127
Total	***3959***	***4125***	***4***	***4125***	***4573***	***11***	***4573***	***4791***	***5***	***4791***	***4709***	***-2***	***5***	***4431***

Key Research Findings

Labour Market	• STRONG

HRSDC[2]

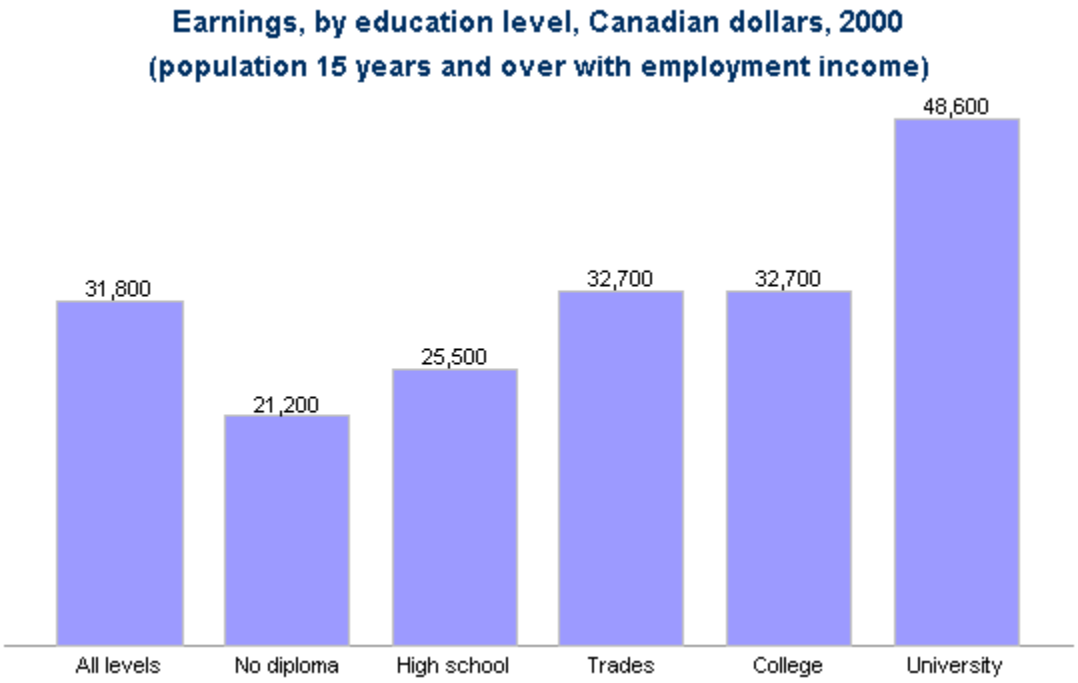
Higher Earnings

Higher education is associated with higher earnings:

In 2000, those who completed their education with a high school diploma earned on average $4,300 more than those without a high school diploma.

Achieving education beyond high school offered an even greater earnings benefit. On average:

- a trades or college graduate earned $7,200 more than a high school graduate;
- a university graduate had earnings nearly double that of a high school graduate ($23,000 more).



Note: Earnings and employment income are used as synonyms here. Average earnings are shown here.
Source: Statistics Canada, Census, Catalogue no 97F0019XCB2001002.

[2] "What Difference Does Learning Make to Financial Security?." *Human Resources and Skills Development Canada*. N.p., Jan. 2008. Web. 10 Aug. 2012. <http://www4.hrsdc.gc.ca/.3ndic.1t.4r@-eng.jsp?iid=54>.

Key Research Findings

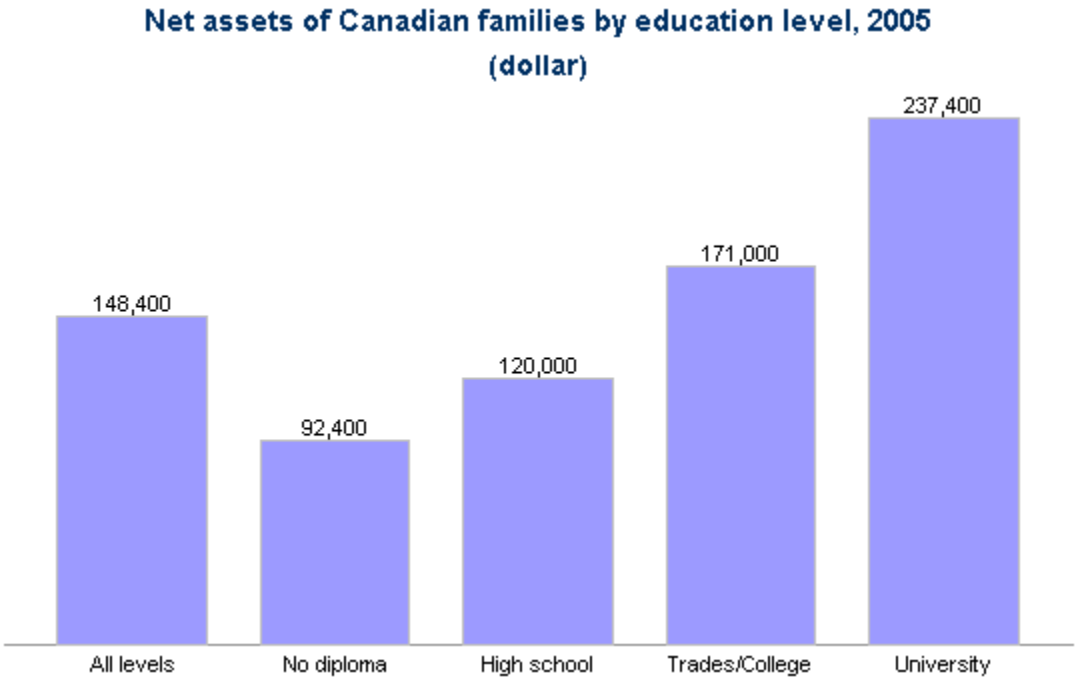
Greater Savings and Assets

Higher earnings lead to greater savings and assets:

In 2005, the *median* value of net assets among those who completed their education with a high school diploma was $120,000, some $27,000 more than for those without a diploma.

Canadians with post-secondary education enjoyed even higher levels of net assets from their higher earnings:

- the median net assets among trades and college graduates was $171,000;
- the median net assets among university graduates was close to $240,000.



Note: 1) Net assets correspond to assets net of debts. See the Annex for more details. The median of net assets is shown here. 2) Education refers to the one of the family member with the greatest income.
Source: Statistics Canada, Survey of Financial Securities 2005.
http://www40.statcan.ca/l01/cst01/famil114.htm. Accessed December 19th 2006.

Key Research Findings

Higher Growth in Earnings

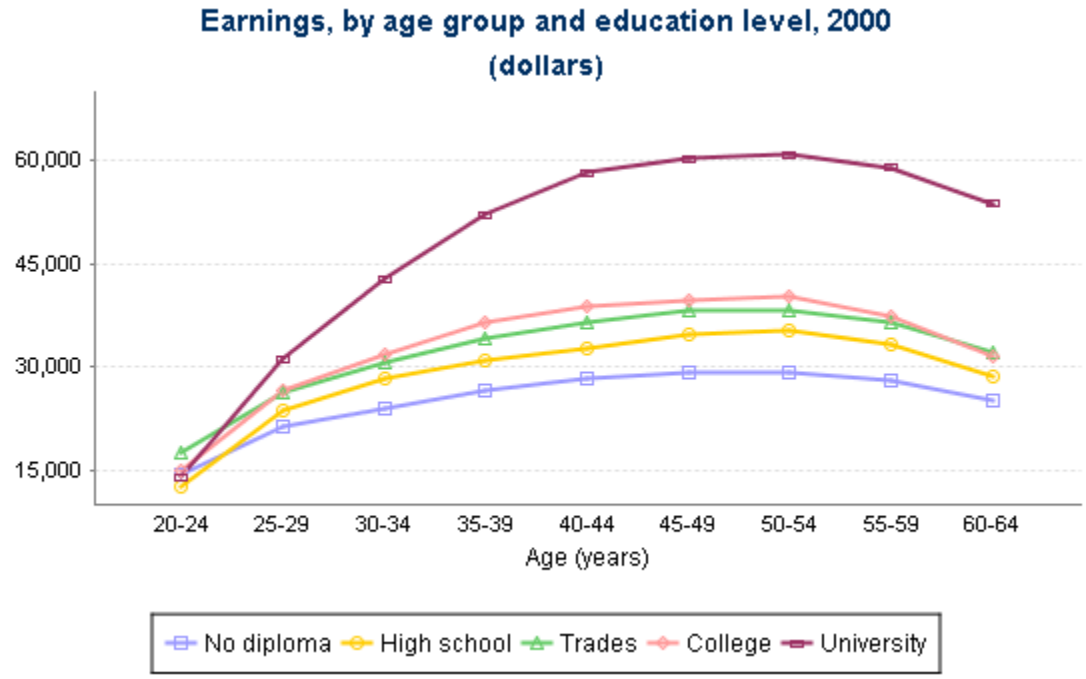
Over the span of a career, higher education means higher growth in earnings:

Over the span of a career, earnings tend to increase with time, peaking around the ages of 50 to 54.

In 2000, growth in average earnings between the ages of 25 and 54 was:

- 49% for those with a high school diploma,
- 53% for those with a college diploma,
- nearly 100% for those with a university diploma.

This growth can be attributed to different career experiences as well as training and learning opportunities.



Note: Earnings and employment income are used as synonyms here. Average earnings are shown here.

Source: Statistics Canada, 2005. Education indicators in Canada: Report of the Pan-Canadian Education Indicators Program, Catalogue no. 81-582-XIE.

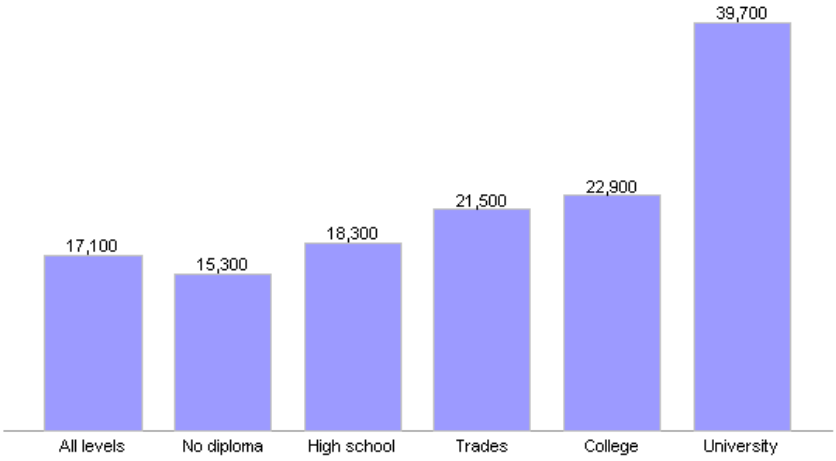
Key Research Findings

Higher Income During Retirement

Higher education also contributes to higher income during retirement:

- In 2000, the median income for seniors with a post-secondary diploma was higher than the median for all levels of education. For university-educated seniors the median income was close to $40,000.

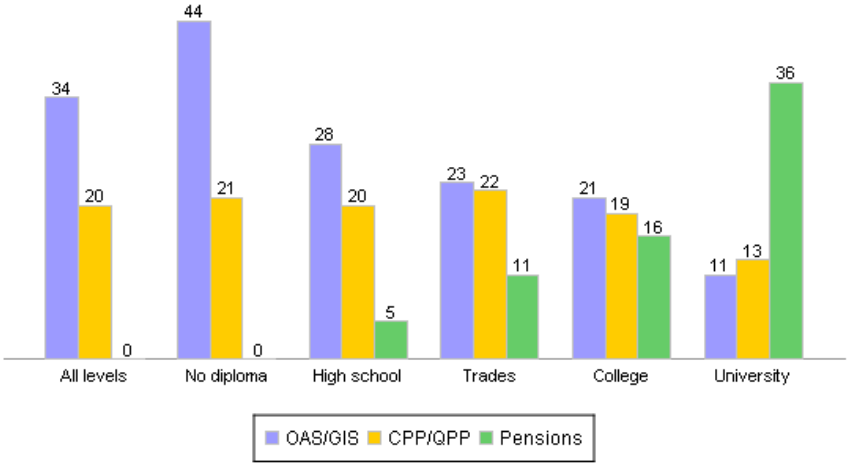
Income of seniors, all sources, by education level, Canadian dollars, 2000
(population aged 65 years and over)



Note: The median of annual gross income is shown here.
Source: HRSDC calculations using Statistics Canada, Census 2001

- Seniors with lower levels of education relied more on Old Age Security benefits (OAS/GIS) as a source of income.
- Seniors with higher levels of education relied more on private pensions.

Percentage of income from selected sources, by education level, 2000
(population aged 65 years and over)

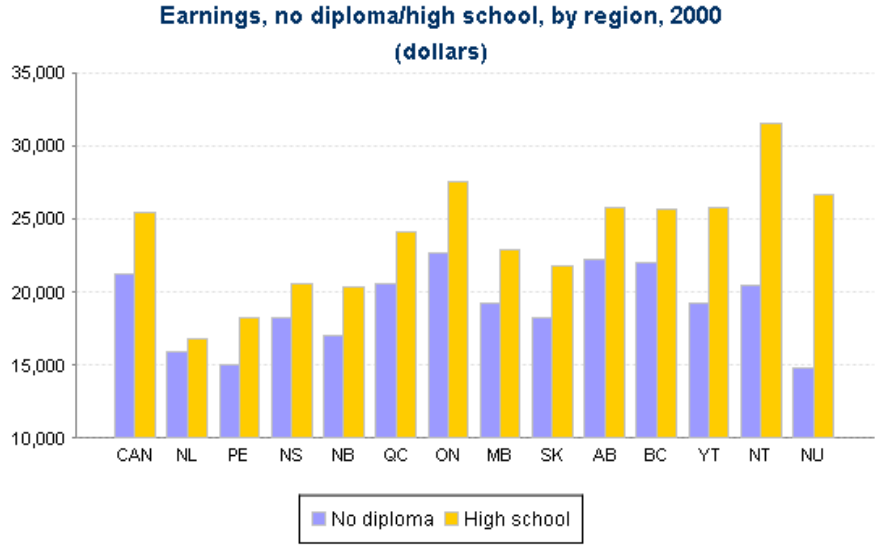


Note: The median of annual gross income is shown here. The category " Private pensions" includes employer-sponsored pensions and private pension plans but not investment income or savings.
Source: HRSDC calculations using Statistics Canada, Census 2001.

Key Research Findings

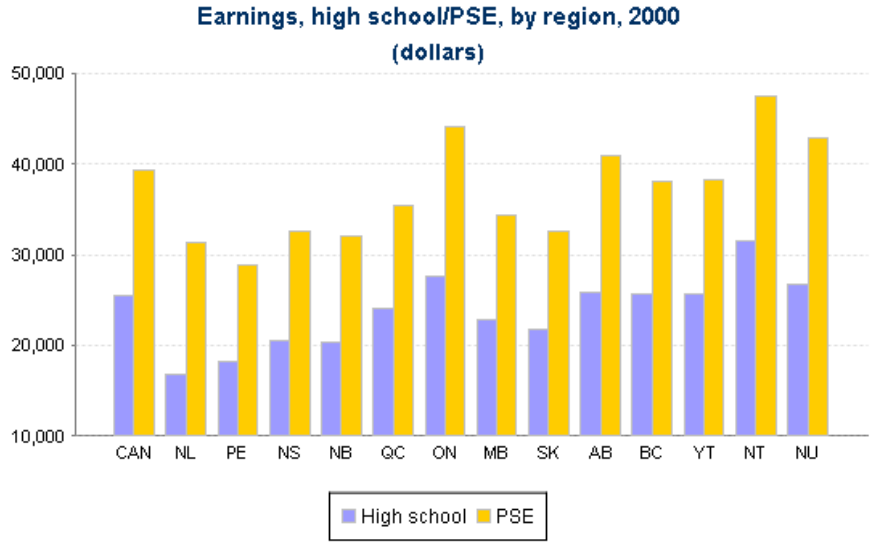
In All Provinces and Territories, Education Yields Higher Earnings

- In 2000, those with a high school diploma earned, on average, anywhere between $900 (Newfoundland) and $12,000 (Nunavut) more than those without a high school diploma.
- The earnings of a high school graduate were higher than the national average in the Northwest Territories, Nunavut, and Ontario.



Note: Earnings and employment income are used as synonyms here. Average earnings are shown here.
Source: HRSDC calculations using Statistics Canada, Census, Catalogue no 97F0017XCB2001002.

- Completing post-secondary education (PSE) translated into average earnings that were between $10,700 (Prince Edward Island) and $16,500 (Ontario) higher than the average earnings of those with a high school diploma alone.
-



Note: Earnings and employment income are used as synonyms here. Average earnings are shown here.
Source: HRSDC calculations using Statistics Canada, Census, Catalogue no 97F0017XCB2001002.

Key Research Findings

Low Income

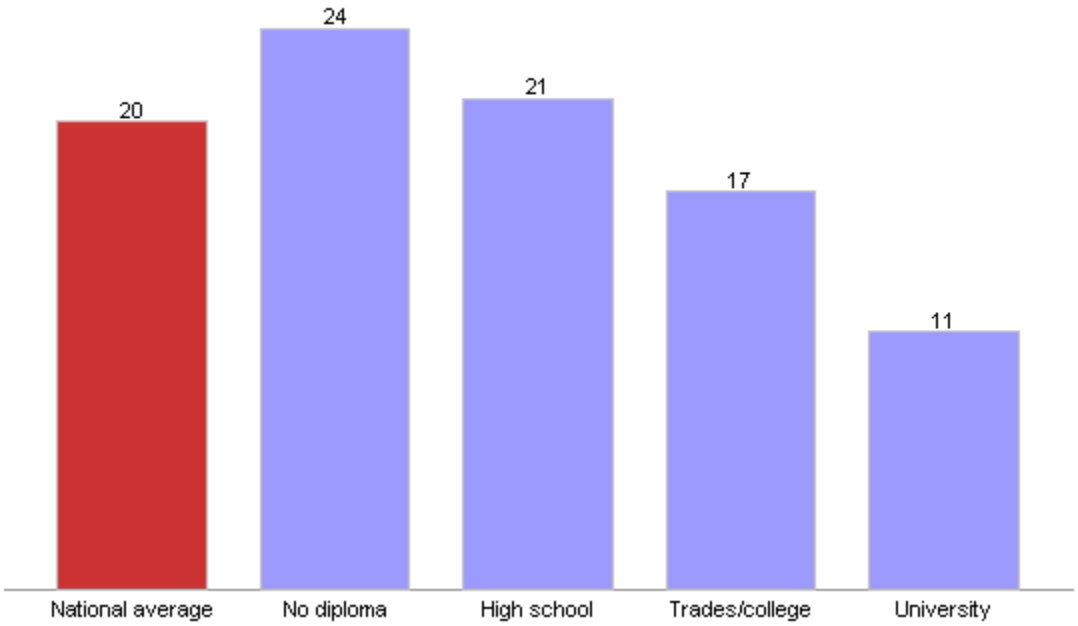
Higher education reduces the risk of experiencing low income:

Between 1999 and 2004, 20% of Canadians experienced at least one year of low income.

A lower proportion of Canadians with a post-secondary diploma were likely to experience low income:

- 17% of trades and college graduates,
- 11% of university graduates.

Proportion of Canadians who experienced low income between 1999 and 2004



Note: Based on after-tax Low Income Cut-Offs. Includes anyone who experienced at least one year of low income. Children aged 16 years and below enter the category "No diploma".

Source: HRSDC calculations using Statistics Canada, Income Trends in Canada, catalogue no 13F0022XIE.

Fewer post-secondary graduates experienced prolonged low income (3 years or more):

- 11% of Canadians without a diploma,
- 9% of high school graduates,
- 5% of trades and college graduates,
- 3% of university graduates.

Key Research Findings

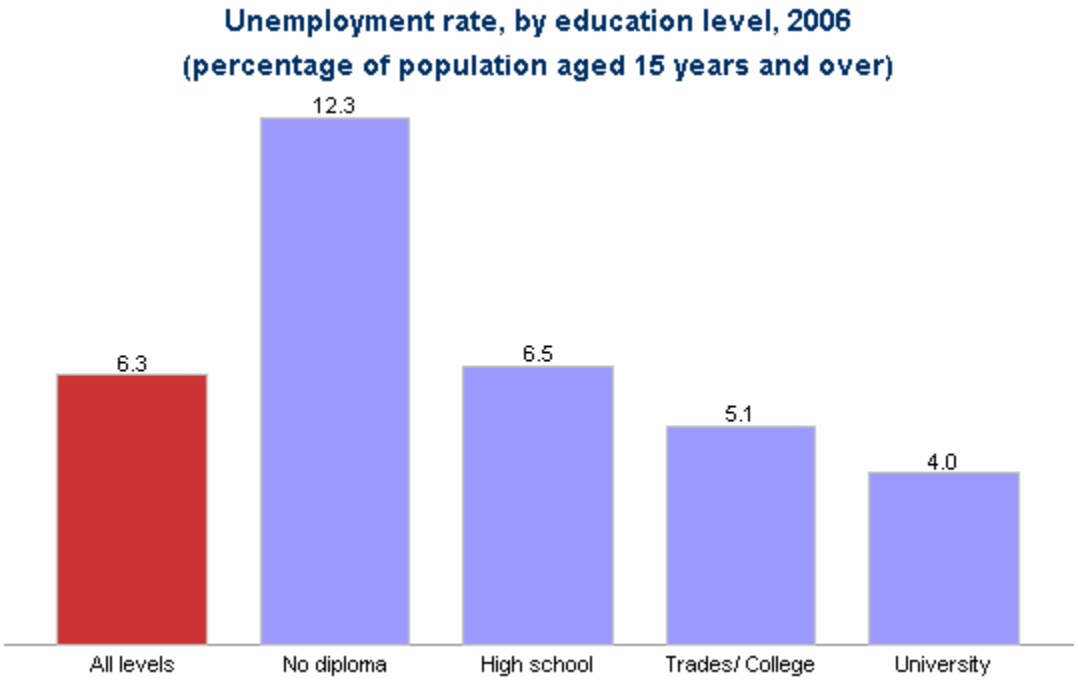
Unemployment

Higher education reduces the risk of experiencing unemployment:

Unemployment rates suggest that high school graduates had close to half the risk of being unemployed than individuals without a diploma in 2006.

The unemployment rate was comparatively low among Canadians with post-secondary education:

- 5.1% for trades and college graduates,
- 4.0% for university graduates.



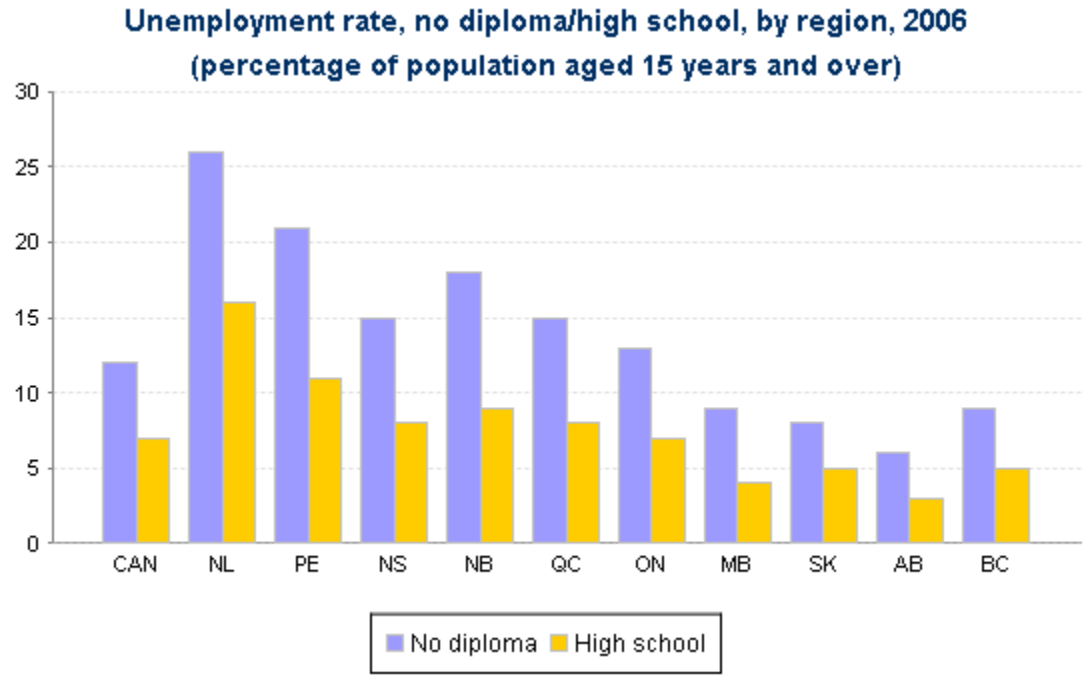
Source: Statistics Canada, Labour Force Historical Review, catalogue no 71F0004X.

Key Research Findings

Regardless of Province

Higher education reduces the risks of experiencing low-income and unemployment, regardless of province:

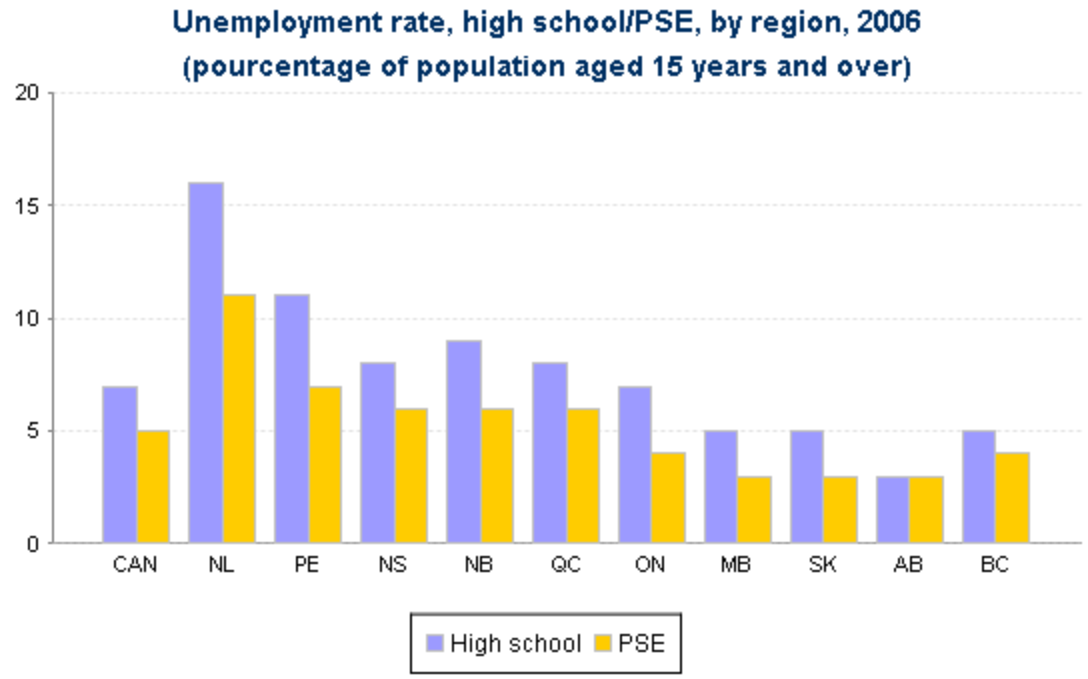
- In 2006, having a high school diploma reduced the risk of unemployment by 3 (Alberta) to 10 (Prince Edward Island) percentage points, compared to the risk for those without a high school diploma.



Source: HRSDC calculations using Statistics Canada, Labour Force Historical Review, catalogue no 71F0004X.

- Having a post-secondary diploma (PSE), compared to obtaining a high school diploma, was associated with lower unemployment in all provinces. The difference in unemployment rates ranged from 1 (Alberta) to 6 (Newfoundland and Labrador) percentage points.

Key Research Findings



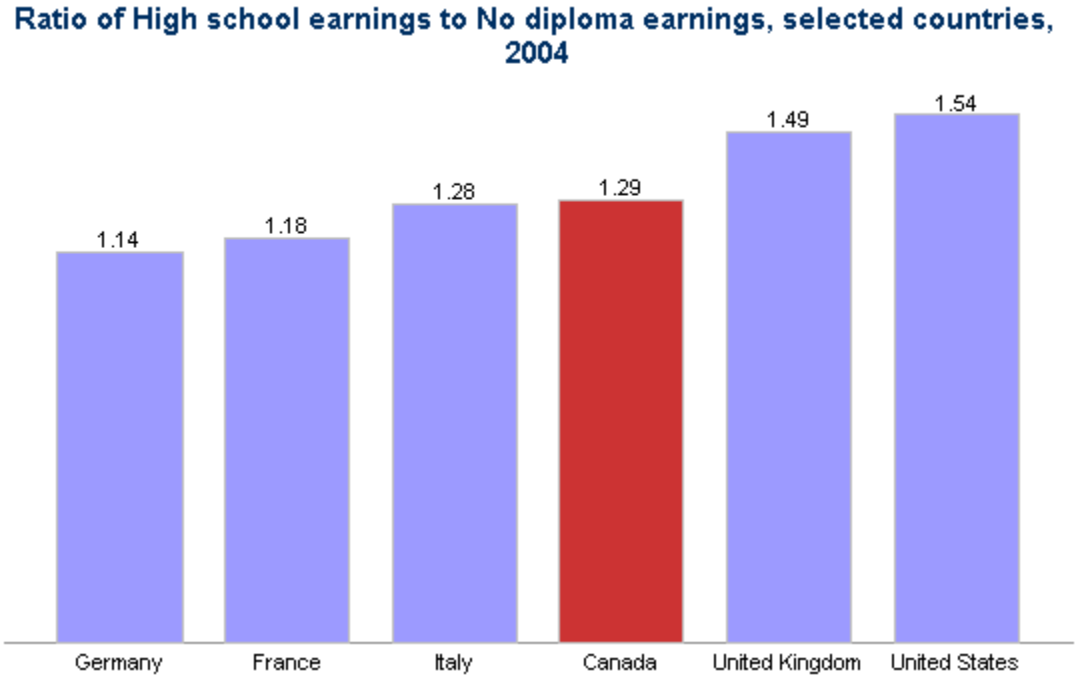
Source: HRSDC calculations using Statistics Canada, Labour Force Historical Review, catalogue no 71F0004X.

Key Research Findings

Canada Compares Well to Other Industrialized Countries

The Canadian earnings advantage of education compares well to that in other industrialized countries:

- In 2002, high school graduates earned an average of 1.3 times more than those without a high school diploma. This was similar to the earnings advantage for high school graduates in Italy.

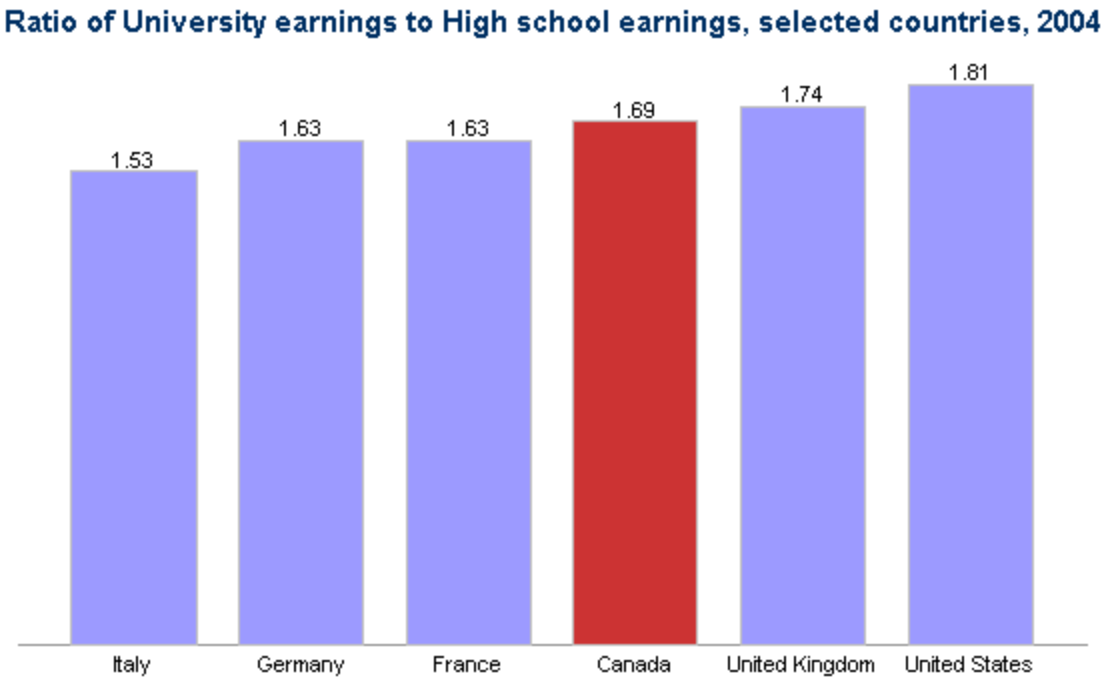


Note: 1) The data is for the year 2003 for Canada and 2002 for Italy. 2) The ratio of earnings is obtained by dividing the average earnings of the higher education level by the average earnings of the lower education level.

Source: Organisation of Economic and Development Cooperation, Education at a Glance 2006, table A9.1a.

- Canadian university graduates, like university graduates in the United Kingdom, earned about 1.7 times more than high school graduates.

Key Research Findings



Note: 1) The data is for the year 2003 for Canada and 2002 for Italy. 2) The ratio of earnings is obtained by dividing the average earnings of the higher education level by the average earnings of the lower education level.
Source: Organisation of Economic and Development Cooperation, Education at a Glance 2006, table A9.1a.

Summary

Higher levels of education contribute to financial security through higher earnings, higher earnings growth, lower job loss risk, greater accumulation of net worth, and higher income in retirement.
For example, Canadians with a post-secondary education enjoy:

- higher earnings, as much as $23,000 on average more than those with only a high school diploma,
- higher earnings growth over their careers,
- up to half the incidence of low income of those with a high school diploma,
- lower unemployment risks,
- higher net assets.

The benefits of education are enjoyed by Canadians across the country.
The earnings advantage of education in Canada is similar to that in other industrialized countries.

Key Research Findings

Competitive Analysis[3]	• MODERATE

The following information consists of OCAS yearly fall application and registration data as well as a conversion ratio for each program under this category:

Certificate

- Fleming's ratio was equal to the system's **(3:1)** in 2011, and the only direct competitor with a ratio that is not lower than the system is Georgian **(3:1)**

- Algonquin has had the highest number of applications but also registrations for the past 5 years

- Georgian had the best ratio in 2011 **(0:1)**, and Canadore had the lowest **(5:1)**

[3] Application data obtained from OCAS College Count Cube October 19, 2011 Registration data obtained from the Program Counts by Applicant Type Report (RPT0050P) in the OCAS Reporting and Analytics Cube December 7, 2011. Some programs/colleges may not be included because they were missing MCU codes in the OCAS dataset Prepared by Fleming Data Research (07-2012)

Key Research Findings

Certificate

Program: 44700 - GENERAL ARTS AND SCIENCE - ONE-YEAR															
	App. 2007	Reg. 2007	Conversion Ratio	App. 2008	Reg. 2008	Conversion Ratio	App. 2009	Reg. 2009	Conversion Ratio	App. 2010	Reg. 2010	Conversion Ratio	App. 2011	Reg. 2011	Conversion Ratio
ALGONQUIN	2420	879	3:1	3053	1033	3:1	3259	1072	3:1	3322	1124	3:1	3754	1195	3:1
CAMBRIAN	110	26	4:1	102	20	5:1	123	36	3:1	102	26	4:1	106	32	3:1
CANADORE	201	31	6:1	169	47	4:1	173	40	4:1	160	44	4:1	216	36	6:1
CENTENNIAL	681	127	5:1	661	127	5:1	629	173	4:1	624	158	4:1	574	144	4:1
COLLÈGE BORÉAL	51	15	3:1	52	19	3:1	42	8	5:1	37	8	5:1	39	21	2:1
CONESTOGA	353	83	4:1	321	69	5:1	296	80	4:1	256	75	3:1	274	93	3:1
CONFEDERATION	142	56	3:1	91	32	3:1	110	35	3:1	108	40	3:1	104	42	2:1
DURHAM	705	289	2:1	723	264	3:1	811	313	3:1	892	347	3:1	935	367	3:1
FANSHAWE	1645	696	2:1	1623	639	3:1	1651	687	2:1	1508	654	2:1	1545	674	2:1
FLEMING	647	203	3:1	626	205	3:1	628	217	3:1	691	255	3:1	735	235	3:1
GEORGE BROWN	679	146	5:1	640	155	4:1	675	149	5:1	640	150	4:1	614	129	5:1
GEORGIAN	3	7	0:1	13	42	0:1	16	61	0:1	9	79	0:1	7	57	0:1
HUMBER	2054	352	6:1	2172	473	5:1	2190	442	5:1	2257	511	4:1	2439	533	5:1
LA CITÉ COLLÉGIAL	165	98	2:1	248	98	3:1	254	111	2:1	199	81	2:1	190	93	2:1
LAMBTON	54	22	2:1	46	20	2:1	59	30	2:1	59	17	3:1	61	18	3:1
LOYALIST	59	18	3:1	65			72	26	3:1	64	25	3:1	87	27	3:1
MOHAWK	47	9	5:1	46	13	4:1	327	111	3:1	504	161	3:1	356	129	3:1
NIAGARA	506	150	3:1	626	186	3:1	608	185	3:1	637	202	3:1	525	157	3:1
NORTHERN	68	24	3:1	67	13	5:1	75	13	6:1	73	12	6:1	60	14	4:1
SAULT	107	34	3:1	105	33	3:1	89	44	2:1	92	49	2:1	91	30	3:1
SENECA	967	289	3:1	845	240	4:1	1209	261	5:1	849	255	3:1	791	229	3:1
SHERIDAN	678	169	4:1	681	196	3:1	887	259	3:1	1067	306	3:1	1034	233	4:1
ST. CLAIR	338	136	2:1	277	96	3:1	251	90	3:1	228	89	3:1	141	43	3:1
ST. LAWRENCE	294	100	3:1	287	105	3:1	367	130	3:1	291	123	2:1	398	178	2:1
Total	***12974***	***3959***	***3:1***	***13539***	***4125***	***3:1***	***14801***	***4573***	***3:1***	***14669***	***4791***	***3:1***	***15076***	***4709***	***3:1***

Financial Analysis	**NOT AVAILABLE**

Source: Program Costing Analysis 2010/2011

- Contribution to Overhead: –
- Program Weight: –
- Funding Unit: –

Key Research Findings

Key Performance Indicators	• WEAK

Source: Key Performance Indicator Summary 5 Year Historical Overview KPI Data from Reporting Years 2008-2012

KPI1-Graduation Rate	-
KPI2-Working	-28% below system
KPI3-Working Related	-10% below system
KPI4-Grad. Satisfaction	+23% above system
KPI8-Student Satisfaction-Learning	-16% below system
KPI9-Student Satisfaction- Teachers	-8% below system
KPI11-Grad. Satisfaction-Program	+9% above system

Resource Analysis

Equipment

Staffing

Space