

Nipissing University

Economic Impact Study

KPMG LLP
January 2018



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1 Executive Summary

1.1 Introduction and Overview of Nipissing University

In July 2017, KPMG LLP was engaged by Nipissing University (“Nipissing” or the “University”) to undertake a study of the economic impacts of the University. KPMG assessed Nipissing’s economic impacts from both quantitative and qualitative perspectives. This report summarizes the results of our review.

Nipissing University is a public university located in North Bay, Ontario, overlooking Lake Nipissing. This regional university has a long history within the city that extends back to initial preparations for establishing a university in North Bay in 1947.

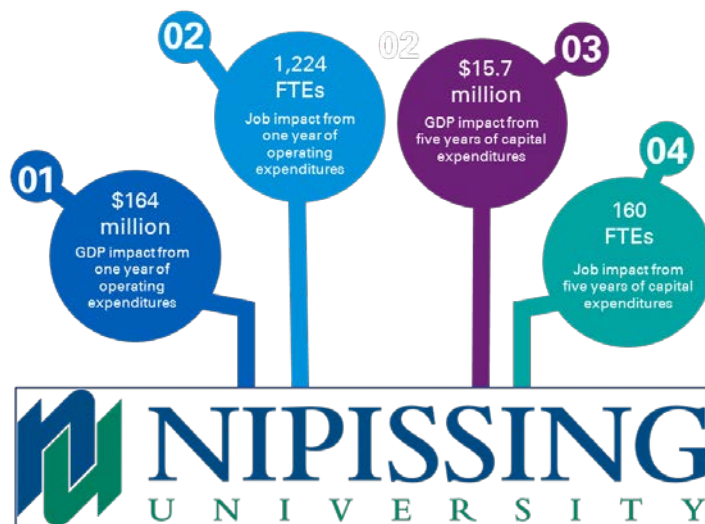
The University’s programs have evolved and expanded to include innovative new undergraduate programs, professional certificates and designations, and a range of master and PhD programs.

Nipissing University actively supports individual and collaborative research that contributes to a deeper, clearer understanding of the world. This priority has resulted in significant growth in Nipissing’s research culture as well as in the number of faculty who have secured tri-council funding.

1.2 Economic Impact through Expenditures

The annual economic impact of ongoing spending related to the operations of Nipissing includes the creation of around 1,224 person-years of employment (“full-time equivalent”, or “FTE”) and an estimated \$163.3 million contribution to Gross Domestic Product (“GDP”) in Canada in 2016-17. Capital investments over the past five years contributed about 160 person-years of employment and had a \$15.7 million contribution to GDP in Canada in 2016-17 dollars.

Figure 1. Summary of Nipissing University’s Economic Impact





Methodology

To quantify the economic impact of Nipissing as a result of its expenditures, KPMG employed economic input/output modelling; this was used to estimate the employment and GDP impacts of various types of expenditures such as salaries and wages, purchases of goods and services, and any indirect taxes.

For this Report, four types of expenditures were analyzed to estimate the economic impact of expenditures either directly incurred by Nipissing, or as a result of activities at Nipissing:

- 1) Operational expenditures by the University, including salaries and benefits and purchases of goods and services, for teaching, research, administration, and ancillary operations;
- 2) Capital expenditures by the University for the construction of new facilities, renewal of existing facilities and purchases of furniture and equipment;
- 3) Living expenses of students originating from outside of North Bay and the surrounding areas; and
- 4) Expenditures by visitors to the University.

Summary of Expenditures

The following table summarizes the expenditures used in this Study. The operating expenditures described are for 2016-17, the most recent data available.

Figure 2. Expenditures related to Nipissing included in Input/Output Analysis

Nipissing University		Non-Local Students	Visitors
Operating	Capital	Living Expenses	Tourism Expenses
<ul style="list-style-type: none"> ▪ Salaries and wages ▪ Benefits ▪ Goods and services ▪ Indirect taxes ▪ Recurring minor capital 	<ul style="list-style-type: none"> ▪ New building construction ▪ Major building renovations ▪ Capital expenditures on ancillaries 	<ul style="list-style-type: none"> ▪ Housing ▪ Food ▪ Books and Supplies ▪ Personal 	<ul style="list-style-type: none"> ▪ Accommodation ▪ Food and beverages ▪ Transportation ▪ Entertainment ▪ Retail
\$81.7 million	\$15.1 million	\$44.3 million	\$1.9 million
Annual	Five year period	Annual	Annual

Results

The following table summarizes the total economic impacts (direct, indirect and induced) generated within Canada as a result of Nipissing's operations.

Figure 3. Summary of Total Employment, GDP, Labour Income and Employment Impacts Within Canada Related to Nipissing

	Annual			Total	Over 5 Years
	Operating Expenditures	Non-Local Student Spending	Friends and Family Visitor Spending		Capital Expenditures
Employment Impact (FTEs)	741.3	461.2	26.4	1,228.8	159.9
GDP Impact (\$ millions)	112.1	49.2	2.1	163.3	15.7
Labour Income Impact (\$ millions)	68.8	25.2	1.2	95.2	10.7

*Note: (a) Totals may not add due to rounding. (b) Jobs are expressed in terms of full-time equivalent positions.
*FTEs – Full time Equivalents
Source: KPMG analysis based on Statistics Canada Interprovincial Input-Output (2010) multiplier results.*

As presented in the table above, Nipissing generates significant impacts on the national, provincial and local economies in terms of both employment and GDP. In total, Nipissing creates approximately 1,229 FTEs and contributes about \$163 million in GDP to the Canadian economy on an ongoing basis through annual expenditures. Additionally, Nipissing created approximately 160 FTEs and contributed about \$15.7 million in GDP over the past five years from its capital expenditures during this period.

1.3 Socioeconomic Impact Analysis

A university brings socioeconomic benefits in the form of intellectual capital, research and employment to a city and it enriches the economy by developing human capital for the regional labour market.

KPMG conducted qualitative economic impact analysis from stakeholder interviews, document reviews and secondary research. These socioeconomic impacts stem from Nipissing’s role as an experience provider, an educator, and its integral role in the community.

The Student Experience

Nipissing is a regional and primarily undergraduate institution that focuses on student success. Although it is already a leader in student satisfaction, Nipissing set out to further enhance the student experience in its 2015 Strategic Plan by:

- Creating access to opportunities at the university, especially for students from northern communities, and Indigenous, first generation, and international learners;
- Creating opportunities outside of the classroom, encompassing athletics, the arts, culture, entertainment, and healthy and active living; and



- Encouraging diversity in its student body, faculty, and staff.¹

The following subsections highlight the socioeconomic impacts from the University's pursuit of academic and research excellence.

Human Capital Development

Nipissing plays a critical role in developing human capital, particularly in the North Bay region and in northern Ontario. Over 90% of students find employment within six months of graduating (compared to the average of 87% for Ontario universities). After two years, approximately 96% of students find employment (compared to the average of 94% for Ontario universities). High employment is due in part to Nipissing's approach to applied and experiential learning. Examples of this include:

- **Bachelor of Education Teaching Practicum** -Teaching experience in a classroom setting.
- **Registered Practical Nurse ("RPN") to Bachelor of Science in Nursing ("BScN") Blended Learning Program** - Provides RPNs with the opportunity to upgrade their nursing credential to a BScN.
- **Internships and placements** - Students in Arts and Science programs such as Social Work, Biology, Geography, Gender Studies, or Criminology and Criminal Justice, among other programs, engage in experiential learning through internships and work and education placements in the local community.
- **Summer Institutes** - Students in all faculties are encouraged to participate in summer institutes that take place in online, onsite, and/or blended formats and that include an experiential component. The institutes are accelerated, condensed courses teaching students how to respond to and engage with the challenges and realities of the workforce.
- **International Learning Experiences.** Students have the opportunity to partake in international placements to practice and enhance their knowledge in new and diverse environments such as Australia, Cameroon, China, Ecuador, Egypt England, Germany, Italy, Jamaica, Kenya, Mexico and the USA.²
- **Biidaaban Community Service-Learning Program** – An Indigenous initiative where students are immersed at non-for-profit organizations and other community organizations in projects or activities.

Nipissing has formed partnerships with organizations across Ontario in order to deliver quality undergraduate and applied professional-level programs. For example, Nipissing University has partnered with organizations such as Toronto Public Health and SickKids to deliver a distance program in Nursing; and with Ontario Provincial Police to deliver experiential learning for Criminal Justice's Police Foundations Program.

Nipissing University also offers a wide range of college partnerships that further support knowledge sharing and human capital development. As a result, there are a number of Nipissing students that have transferred from colleges or are participating in a joint program with a college. The most prominent Nipissing-college partnership is with Canadore College ("Canadore"), which shares its main campus facilities with the University. Additionally, Nipissing has established program

¹ Nipissing University, Strategic Plan, 2015-2020

² Strategic Mandate Agreement, 2017-20, Draft Submission Template between the Ministry of Advanced Education and Skills Development and Nipissing University



partnerships with Algonquin, Centennial, Scarborough, Niagara, Lambton, Sarnia, and St. Clair colleges.

Access and Equity to Post-Secondary Education

The existence of Nipissing gives students from small, non-urban communities, particularly in northern Ontario and Indigenous communities, access to post-secondary education. Nipissing has made a conscious effort to improve post-secondary equity and access while maintaining the highest-ranked level of student services among primarily undergraduate universities across Ontario.³ As a result of its efforts, Nipissing has a large percentage of female (72%), First Generation (10%) and Indigenous (10%) students, as well as students following non-traditional pathways (e.g., college transfers, professionals, mature students).⁴

Academic and Research Excellence

Research excellence has increasingly become a priority for the University and, as a result, Nipissing has grown its research culture significantly over the past decade. Nipissing University is attracting tri-council funding, research grants, industry funding, as well as growing an impressive publication record.

As part of its strategic mandate, Nipissing aims to be community-driven and regionally relevant. Many research areas focus on problem-based learning while keeping the objectives and priorities of the community and wider region of northern Ontario in mind.

As an example, a number of Nipissing researchers are investigating factors that enhance the productivity of the farming industry in northern Ontario. This initiative involves collaboration across Nipissing's Geography, Computer Science and Mathematics departments, and Agriculture and Agri-Foods Canada ("AAFC") and focuses on using remote sensing and environmental monitoring to increase crop productivity.⁵

The success of Nipissing's academic and research excellence is reflected in its alumni. Over 70% of Nipissing alumni who participated in the Nipissing Alumni Survey are in full-time employment. This figure rises to 85% when taking into account those who are employed part time or seasonally. Further, over 50% of respondents are working in a position directly related to their field of study and almost 75% of the respondents expressly said that Nipissing prepared them for developing a career or provided work-related knowledge and skills.

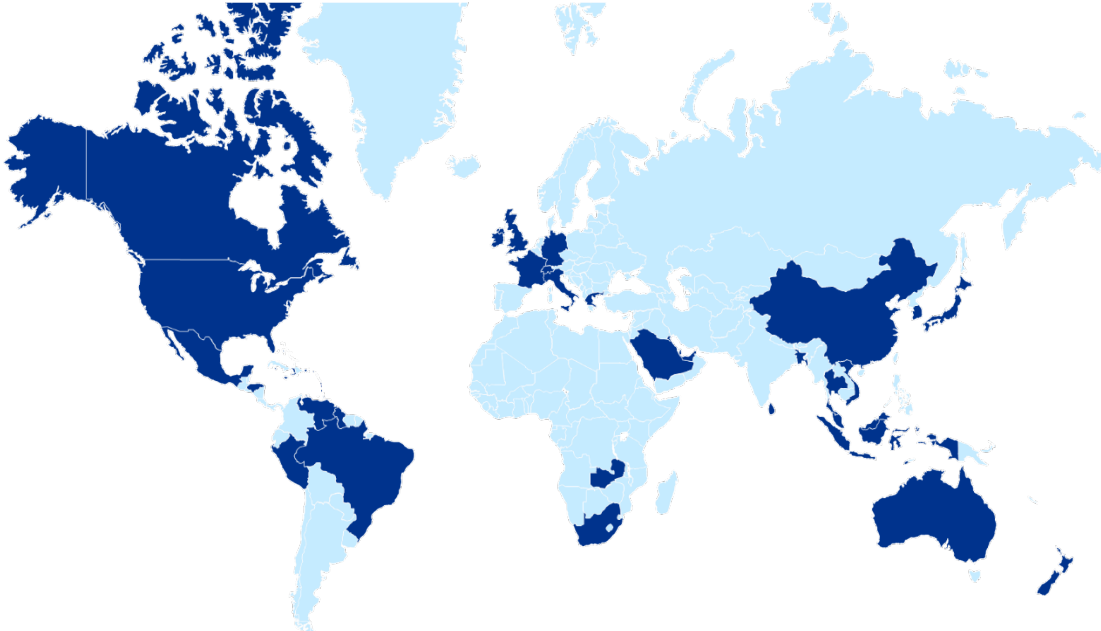
While the majority reside in Canada, Nipissing's alumni have a presence across the globe. The following figure presents a map of Nipissing's alumni network (shaded in dark blue).

³ Provided by Nipissing University

⁴ Strategic Mandate Agreement, 2017-20, Draft Submission Template between the Ministry of Advanced Education and Skills Development and Nipissing University

⁵ May 26, 2017 Senate Agenda and Documents

Figure 4. Map of Active Alumni Presence Including Canada



Source: Provided by Nipissing University

Community Engagement

Nipissing's strategic decisions from student experience, academic, and research perspectives are grounded in its role in the development of the North Bay region and northern Ontario. In its 2015 Strategic Plan, Nipissing set out to enhance its community engagement by:

- “Embracing the communities served by the University and developing meaningful partnerships of mutual benefit;
- Developing the strengths of each of its campuses and ensuring access to academic and extra-curricular opportunities;
- Enhancing its capacity as an engine of economic, social, and cultural development for its communities in an environmentally sustainable manner.”⁶

Faculty and Student’s Involvement in the Local Community

Through involvement by its student body and faculty members, Nipissing is active in community building in the region:

- The student population in Nipissing is active in local organizations, for example, mentoring Indigenous youth, fundraising for charities, and organizing a book drive for a local literacy program.

⁶ Nipissing University Strategic Plan 2015-20



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- Faculty and staff are involved members of the community, dedicating a portion of their time to service as volunteers and board members of local organizations, such as Hands (Local Family Help Network), Gallery Hop (promoting arts and culture) and Health Quality Ontario.
- Students and faculty are jointly involved in extracurricular programs, such as Engineering summer camps and Math Circles and Nipissing's Mobile-Experiential Leadership Development ("MELD") summer program
- Nipissing has invested in a state-of-the-art Library in partnership with Schulich, the province and Canadore College. The Library is open to the public, which helps build literacy in the community and encourages community collaboration.
- The Nipissing University hockey teams support the North Bay arena as a key tenant, which results in securing a more consistent use of the arena and revenue for the City of North Bay.
- Nipissing has been the location for a number of television programs and film projects, which has spurred collaboration between the City of North Bay and faculty of Arts and Science to develop a new curriculum in order to attract and cater to the demand from the film industry.

Indigenous Community Engagement

Nipissing builds and strengthens connections with Indigenous communities by actively participating in discussions facilitated and supported by the Office of Indigenous Initiatives. The sixth and current President of Nipissing University chairs the Reconciliation North Bay committee and is the founding Executive Director of the Aboriginal Healing Foundation, a national organization that addresses the legacy of Indian Residential Schools.

Nipissing also provides experiential learning opportunities for its students. Specifically, the Biidaaban Community Service-Learning Program places Nipissing University students with not-for-profit organizations to meet community needs. A specialized focus of Biidaaban Community Service-Learning is to support First Nation, Metis and Inuit students in grades K-12 through co-curricular programming.

Local Economic and Workforce Development

Nipissing monitors labour trends and local labour demands, and adapts and evolves its curricula and collaborations to deliver relevant programs and develop human capital with key skills for the benefit of the community. For example, in order to remain relevant to the region's healthcare needs, Nipissing has expanded its offerings to the three nursing programs to include further education for professional nurses. This has resulted in local organizations such as the local health centre benefiting from a consistent stream of professional nurses. Further to this, programs such as criminal justice and social work have been set up specifically in order to address labour demands in these industries, developing civil servants in criminal justice and social work.



2 Introduction and Overview of Nipissing University

Building on its deep roots as an affiliate of Laurentian University since 1967 and as North Bay Normal School in the 1900s, Nipissing University welcomed its first students as an independent university in 1992.

2.1 Introduction

In 2017, KPMG LLP was engaged by Nipissing University (“Nipissing” or the “University”) to undertake an economic impact study (“Study” or the “Report”) to estimate the economic impacts of Nipissing’s activities within the City of North Bay and the greater region from both quantitative and qualitative perspectives.

To undertake the assessment of the economic impacts from Nipissing’s activities, a wide range of documents were reviewed, interviews were conducted with stakeholders⁷ identified by Nipissing, and desktop research was conducted to supplement information gathered from documents and interviews. For the quantitative analysis, the 2016-17 fiscal year was the base year for data collection. However, where data from the 2016-17 fiscal year was not available, data for calendar and academic years closest to the base year were also used. These instances are specified in more detail in the next section. The Report is laid out as follows:

- **Section 2: Introduction and Overview of Nipissing University** provides a brief overview of the University, including its location and history, student enrollment and academic achievements, and historic growth of the University;
- **Section 3: Economic Impact through Expenditures** presents results of the quantitative economic impact assessment of the University’s operating and capital expenditures, as well as of expenditures of non-local students and visitors as a result of the University;
- **Section 4: Socioeconomic Impact Analysis** presents findings from the qualitative assessment of the University’s programming and community activities, which contribute to the University’s commitment to research and academic excellence, human capital development, and the local community; and
- **Section 5: Conclusion** summarizes key quantitative and qualitative findings.

Further details supporting the various aspects of analysis presented in the report are also included in the Appendix, as follows:

- **Appendix A:** List of Stakeholders Interviewed
- **Appendix B:** Interview Questions

2.2 Overview of Nipissing University

This section provides a brief overview of the University, including its location and history, student enrollment and academic achievements, and the growth of the University.

⁷ For a comprehensive list of stakeholders interviewed, see Appendix A

2.2.1 Location and History

Nipissing University is a public university located in North Bay, Ontario, overlooking Lake Nipissing. This regional University has a long history within the city that extends back to initial preparations for establishing a University in North Bay. In 1947, Northeastern University was incorporated and the first programs were in place in 1960. In 1967, an affiliation agreement with Laurentian University was signed and Northeastern University was renamed Nipissing College. In 1973, the North Bay Teachers' College (formerly the North Bay Normal School founded in 1909) joined Nipissing College as the Faculty of Education (now the Schulich School of Education). In 1992, Nipissing received the right to grant baccalaureate degrees as an independently chartered university, and the name of the institution changed to Nipissing University in the same year.

The University's programs have evolved and expanded to include innovative new undergraduate programs, professional certificates and designations, and a range of master and PhD programs through the Faculty of Arts and Science, the Faculty of Applied and Professional Studies, the Schulich School of Education, as well as the School of Graduate Studies. Nipissing shares a campus and offers a number of joint programs with Canadore College, and has College Partnership Agreements with Algonquin, Niagara, St. Clair, Centennial, and Lambton colleges.

Nipissing University actively supports individual and collaborative research that contributes to a deeper, clearer understanding of the world. This priority has resulted in significant growth in Nipissing's research culture as well as in the number of faculty who have secured tri-council funding.

2.2.2 Faculties and Program Offerings

The University offers a variety of programs (as noted in Figure 5) through three faculties: the Schulich School of Education, the Faculty of Arts and Science, and the Faculty of Applied and Professional Studies. The University also has a School of Graduate Studies and, despite still being a predominately undergraduate university, offers an increasing number of graduate programs and professional certification programs. The table below lists all of the programs offered at Nipissing.⁸

Figure 5. Faculties and Program Offerings at Nipissing University

Faculty	Program
Schulich School of Education	Aboriginal Programs Bachelor of Education Degree (Concurrent & Consecutive) Bachelor of Physical and Health Education Aboriginal Teacher Certification Program ("ATCP") (Diploma) Aboriginal Classroom Assistant Program (Diploma) Teacher of Anishnaabemwin as a Second Language Program (Diploma)

⁸ <http://www.macleans.ca/schools/nipissing-university/>



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Faculty	Program
Faculty of Arts and Science	Anthropology Biology Child and Family Studies Classical Studies Commerce Computer Science Economics English Studies Environment and Physical Geography Environmental Biology and Technology Environmental Geography Fine Arts Gender Equality and Social Justice Geography History Liberal Arts Liberal Science Mathematics Native Studies Philosophy Political Science Psychology Religions and Cultures Sociology
Faculty of Applied and Professional Studies	Business Criminal Justice Social Welfare and Social Development Social Work School of Nursing
School of Graduate Studies	Master of Arts in History Master of Arts in Sociology Master of Education Master of Science in Kinesiology Master of Science in Mathematics Masters of Environmental Sciences/Studies PhD in Education

Source: Nipissing University

These programs are delivered by 188 faculty members and supported by 259 administrative and support staff. A summary of the number of faculty and staff at the University is provided in Figure 6. According to a 2015 report⁹, Nipissing is one of the top three employers in North Bay.

⁹ Mccharles, J. (March 2015). Hospital and school board city's top employers. *The Nugget*. Available at: <http://www.nugget.ca/2015/03/02/hospital-and-school-board-citys-top-employers>

Figure 6. Number of Faculty and Staff at Nipissing University (FTEs)

Faculty and Staff	FTEs
Part-Time Support Staff	14
Full-time Support Staff	157
Executive Administrative Staff (e.g., Deans and Associate Deans)	9
Administrative Staff	79
Faculty	188
Total	447

Source: Nipissing University

2.2.3 Student Enrollment in Programs and Academic Achievement

In 2016-17, approximately 4,800 students were enrolled at Nipissing, with the majority (96%) enrolled in an undergraduate program. The following table presents Nipissing's student population by program in 2016-17.

Figure 7. Nipissing Student Population

Program	Enrollment
Undergrad	4,648
Nursing	1,344
Humanities and Liberal Arts	913
Education	744
Business	664
Science	617
Physical and Health Education	309
Social Work	42
Environmental Studies	15
Graduate	189
Education	141
Environmental Studies	24
Humanities	13
Kinesiology	7
Mathematics	4
Total	4,837

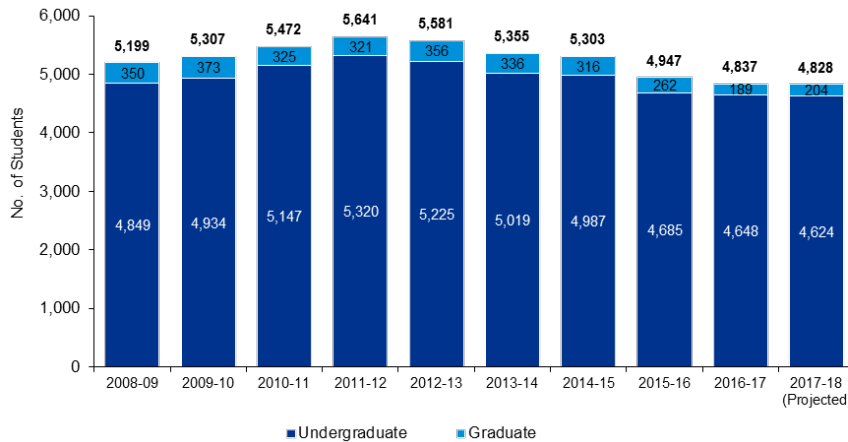
Source: Nipissing University

As demonstrated in the table above, the top three programs students by enrollment at the undergraduate level are Nursing, Humanities & Liberal Arts, and Education.

The following graphic presents the history of Nipissing's student population over ten years, including projections for 2017-18. This demonstrates that enrollment at the University was relatively stable

between 2008-09 and 2014-15 and then declined slightly for 2015-16 onward. This has been an issue faced by many regional universities similar to Nipissing in recent years.¹⁰

Figure 8. Nipissing Student Enrollment over Ten Years (2008-09 to 2017-18)



One of the top three programs that students enroll in at the University is Education. Nipissing has the largest percentage of students enrolled in a Bachelors of Education program of any University in Ontario.¹¹ Although this is an aspect of the University that makes it unique, demand for teachers has declined in the Province of Ontario over the last 10 years. This has had negative effects on the University's overall student enrollment, as demonstrated by the slight decline in enrollment in Figure 8. Over the same time period, many of the University's Arts and Science programs that complemented the Education program also saw significant declines in enrollment.¹² Fortunately, enrollment in Nipissing's Nursing programs has increased significantly over the past five years. Further to this, programs such as the Criminal Justice and Social Work, which were set up specifically in order to address local labour demands, have also seen enrollment increases. This demonstrates Nipissing's efforts to offset enrollment declines in Education and Arts and Science programs.

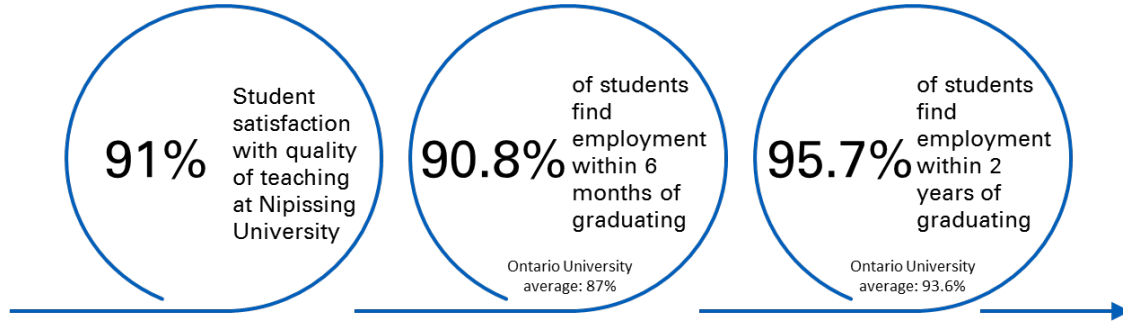
Despite the slight decline in student enrollment, Nipissing has continued its commitment to providing quality education to students – ultimately to set them up for success after graduation. To illustrate this, the following diagram depicts a sample of recognition and praise that Nipissing has received from students and alumni:

¹⁰ Tanburri, R. (September 2015). University applications fall in less populous parts of Ontario. *University Affairs*. Available at: <https://www.universityaffairs.ca/news/news-article/university-applications-fall-in-less-populous-parts-of-ontario/>

¹¹ Strategic Mandate Agreement, 2017-20, Draft Submission Template between the Ministry of Advanced Education and Skills Development and Nipissing University

¹² Strategic Mandate Agreement, 2017-20, Draft Submission Template between the Ministry of Advanced Education and Skills Development and Nipissing University

Figure 9. Nipissing Recognition



Source: 2015 CUSC Graduating Students Survey; 2016 Ontario University Graduate Survey

2.2.4 Research at the University

Nipissing is a primarily undergraduate institution; however, academic and research excellence has increasingly become a priority for the University. As a result, Nipissing has grown its pool of research fellows significantly over the past decade.

In 2016-2017, Nipissing received over \$2 million in research funding from public and philanthropic sources to support various initiatives and research programs. This represents an over 40% increase to Nipissing’s research funding over the past five years, which was \$1.46 million in 2011-2012.¹³ Through the University’s continued efforts in furthering research excellence, there are currently four Canada Research Chairs at Nipissing. A summary of grant funding received by the University in 2016-17 is summarized in the following table:

¹³ Strategic Mandate Agreement, 2017-20, Draft Submission Template between the Ministry of Advanced Education and Skills Development and Nipissing University



Figure 10. Grant Funding Received by Nipissing University in 2016-17

	No. of Grants/Awards	Value (\$)
Chairs Secretariat		
Canada Research Chair CRC)	4	400,000
Research Support Fund (RSF)	1	400,000
Subtotal - Chairs Secretariat	5	800,000
Tri-Council Research Grants		
Social Sciences and Humanities Research Council (SSHRC)	12	310,000
Natural Sciences and Engineering Research Council (NSERC)	15	320,000
Canadian Institute of Health Research (CIHR)	2	42,000
Subtotal - Tri-Council Research Grants	29	672,000
Other		
Canada Foundation for Innovation (CFI)	2	200,000
Ministry of Research, Innovation and Science	1	130,000
Ministry of Education	2	24,000
Northern Ontario Heritage Fund Corporation (NOHFC)	2	20,000
Correctional Services Canada (CSC)	3	67,000
Ministry of Community Safety & Correctional Services (MCSCS)	2	23,000
Ontario Ministry of the Environment and Climate Change (OMECC)	1	60,000
Other Grants & Awards	14	206,000
Subtotal - Other	27	730,000
Total	61	2,202,000

Source: Nipissing University

It is apparent that Nipissing's activities and programming offer a wide range of opportunities for its students. Through Nipissing's development and delivery of a diverse program for its student population, Nipissing's activities also impact the North Bay community. Finally, Nipissing impacts the Ontario and Canadian economies through the direct, indirect and induced economic impacts resulting from its operational expenditures, capital investment, student and visitor spending. These expenditures have direct and indirect impacts on employment, business income, labour income and government income in the various jurisdictions, and these impacts are quantified in the following section.

3 Economic Impact through Expenditures

The economic impact of ongoing spending related to Nipissing includes the creation of approximately 1,282 full-time jobs and an estimated \$163 million contribution to GDP in 2016-17. Capital investments over the past five years contributed about 160 person-years of employment and had a \$15.7 million contribution to GDP in 2016-17 dollars.

3.1 Introduction

In 2016-17, Nipissing University's operating expenditures amounted to \$81.7 million.¹⁴ Over the past five years, Nipissing's capital expenses have amounted to \$15.1 million. Additionally, the existence of the University has resulted in out-of-town students and their friends and family coming into the region and thereby spending money in the local economy. These expenditures, both by and as a result of the University's operations, contribute to the local economy through expenditures on goods and services, as well as the creation of jobs locally, provincially, and nationally.

The purpose of this section is to quantify the economic impacts of annual operational spending and capital investments over the last five years by Nipissing. Direct, indirect, and induced economic impacts are estimated based on operational and capital expenditures incurred by Nipissing University. Further, the economic impacts of expenditures by students and visitors from outside the North Bay region are captured.

3.2 Methodology

To quantify the economic impact of Nipissing, KPMG employed economic input/output modelling, which was used to estimate the employment and GDP impacts of various types of expenditures such as salaries and wages, purchase of goods and services, and indirect taxes.

For this Report, four types of expenditures were analyzed to estimate the economic impact of expenditures either directly incurred by Nipissing, or as a result of activities at Nipissing:

- Operational expenditures by the University, including salaries and benefits, and purchases of goods and services for teaching, research, administrative and ancillary operations (for the most recent fiscal year);
- Capital expenditures by the University for the construction of new facilities, renewal of existing facilities and purchases of furniture and equipment (for the last five fiscal years);
- Living expenses of students originating from outside of North Bay and the surrounding areas (for one fiscal year); and
- Expenditures by visitors to the University (for one fiscal year).

The estimated impacts from Nipissing's operating expenditures, from living expenses of non-local students, and from visitor expenditures are based on Nipissing's 2016-17 fiscal year. Since capital projects generally are implemented over multiple years, economic impacts of Nipissing's capital expenditures are taken over a five year period, between 2012-13 and 2016-2017. All expenditures

¹⁴ Nipissing's most recent fiscal year was from May 1st, 2016 to April 30th, 2017



used in our analysis were adjusted to 2016 dollars. As such, economic impacts presented in this Report are in 2016 dollars.

Each of these areas of expenditures is described in more detail in Section 3.3 of this Report.

3.2.1 Overview of the Input-Output Model

An input-output (“I/O”) model divides the economy into a matrix of industries and commodities. Relationships within the model map the production of commodities to industries and identify the primary or intermediate commodities that are used in the production of each final commodity. Final commodities are either used by consumers or sold as an export. The model then aggregates all of the expenditures on goods and services and in the supply chain as commodities are produced. Based on the commodity structure of a specific industry, an I/O model can estimate the employment, gross output, and the labour, business and government income (collectively, the value-added) as a result of expenditures in that industry.

In Canada, the most authoritative and comprehensive I/O model is the Interprovincial Input-Output Model of Statistics Canada (“Statistics Canada I/O Model”). The Statistics Canada I/O Model can be used two ways. If detailed expenditure data are available, a tailored production function of a given entity can be developed and the I/O model can simulate the economic impacts based on that commodity structure. If detailed expenditure data are limited, multiplier tables can be used. Multiplier tables are based on the aggregate production function of a given industry. For the purposes of this Study, Statistics Canada’s I/O multiplier tables were used to estimate the economic impacts presented in this Report.

The Statistics Canada I/O multiplier tables used in this analysis are the most recent versions publicly available and are calibrated to Canada’s economy in 2010. This means that economic impacts are based on the commodity structure of industries in 2010. Statistics Canada’s I/O Model is managed and calibrated solely by Statistics Canada, including the assumptions that are built into the model.

Based on Nipissing’s expenditures, the I/O multiplier tables were used to estimate economic impacts. In this Study, KPMG highlights employment, Gross Domestic Product (“GDP”, or “value-add”), and labour income impacts as a result of the University’s expenditures. Specifically, each of the impacts approximated measures the following:

- **Employment** estimates the number of jobs created and is measured in terms of Full-time Employment (“FTE”) positions. An FTE is assumed to be equivalent to one full-time position that is held for one year;
- **GDP** impact is a measure of economic output from the production of goods and services, measured in dollars. It measures the total amount of “value-add” that individual producers contribute to purchased inputs to generate their output. While GDP impacts can be broken down into segments corresponding to labour income, government revenues and income to businesses, this Study separately reports only labour income in addition to reporting overall GDP impact; and
- **Labour income** is defined as all compensation paid to employees (e.g. including wages, salaries, employer social contributions, bonuses and performance pay etc.). Labour income is measured in dollars and is a component of the GDP impact. The reason that this is emphasized in this Study is because a majority (65%) of Nipissing’s operating expenditures are on salaries, wages and benefits.



I/O Models allow for economic impacts to be measured using three perspectives: (i) direct; (ii) indirect; and (iii) induced impacts. A definition of each type of impact is provided below:

1. **Direct impacts** are those economic impacts generated by the industry in question and can be observed through an analysis of an industry's employee base, payroll, taxes paid and the difference between the value of sales and purchased inputs;
2. **Indirect impacts** are those economic impacts generated by suppliers further-up the supply chain. For example, suppliers to an industry have their own employees and purchase commodities from other suppliers in turn. These expenditures ultimately result in income to labour, income to businesses or governments, or in the import of a good or service from another jurisdiction; and
3. **Induced Impacts** are the direct and indirect impacts that result from the subsequent spending by employees of their wages and salaries. This includes spending by employees both within an industry and within its upstream supplier base. It is important to note that induced impacts should be interpreted with some caution as they are affected by a household's propensity to save, amongst other variables. For example, when an economy experiences high unemployment household saving rates tend to increase and induced economic impacts will decrease. Therefore it is important to be mindful that induced economic impacts may not always materialize to the extent shown.

3.3 Summary of Expenditures

As noted in the section above, expenditures incurred by or as a result of Nipissing are used as inputs to approximate direct, indirect, and induced economic impacts. Calculations are done through use of Statistics Canada’s I/O Model. The following table summarizes the expenditures used in this Study. Expenditures by and as a result of Nipissing have impacts on the national, provincial and local economies, both in terms of employment and in terms of value-added activities

The operating expenditures described are for 2016-17, the most recent data available at the time of conducting this analysis.

Figure 11. Expenditures related to Nipissing included in Input/Output Analysis

Nipissing University		Non-Local Students	Visitors
Operating	Capital	Living Expenses	Tourism Expenses
<ul style="list-style-type: none"> ▪ Salaries and wages ▪ Benefits ▪ Goods and services ▪ Indirect taxes ▪ Recurring minor capital 	<ul style="list-style-type: none"> ▪ New building construction ▪ Major building renovations ▪ Capital expenditures on ancillaries 	<ul style="list-style-type: none"> ▪ Housing ▪ Food ▪ Books and Supplies ▪ Personal 	<ul style="list-style-type: none"> ▪ Accommodation ▪ Food and beverages ▪ Transportation ▪ Entertainment ▪ Retail
\$81.7 million	\$15.1 million	\$44.3 million	\$1.9 million
Annual	Five year period	Annual	Annual

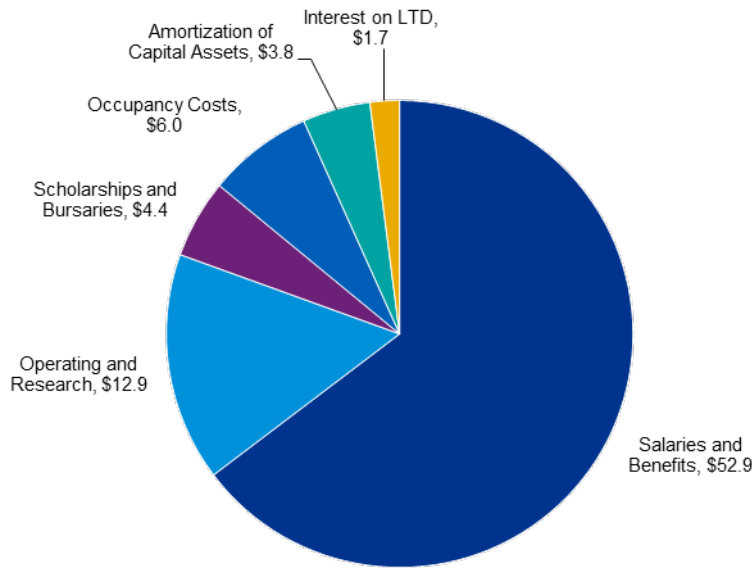
The expenditures above are further described below.

3.3.1 Operating Expenditures of Nipissing

Audited financial statements for the 2016-17 fiscal year were used to compile the operating expenditures of Nipissing. Among the total operating expenses of \$81.7M, salaries and benefits made up 65% of the University’s annual operating expenditures. The Figure 12 presents other components of operating expenses incurred for the last audited fiscal year (as at preparation of this Report).

Between May 1st, 2016 and April 30th, 2017, Nipissing spent \$81.7 million to operate the University. The majority (65%, or \$52.9 million) was spent on salaries and benefits. A summary of the University’s operating expenditures based on its consolidated financial statements is presented in the following figure.

Figure 12. Summary of Nipissing University Operating Expenditures (\$ millions)



Source: Nipissing University 2016/17 Consolidated Financial Statements

3.3.2 Capital Expenditures

Nipissing undertakes capital projects on an ongoing basis at its North Bay campus. Since capital projects generally occur over multiple years and can vary in volume from year to year, economic impacts are estimated based on Nipissing’s capital expenditures over five years, between 2012-13 and 2016-17. This approach was agreed to by the University as providing a representative sample of the University’s capital investments. Examples of capital investments may include:

- Construction of new buildings, additions to existing buildings and other new facilities;
- Major building renovations, upgrading and new installation of utilities and other infrastructure;
- Capital expenditures on ancillaries such as furniture, computers and other equipment (sometimes referred to as “Furniture, Fixtures and Equipment” or “FF&E”).

Over the past five years, the University spent approximately \$15.1 million¹⁵ on capital projects and purchases.¹⁶ The total amount includes only major capital projects and does not include land purchases or recurring minor capital projects, which are already captured under operating expenditures.

Nipissing noted its plans to undertake capital investments totaling \$5.5 million in its 2017-18 fiscal year.¹⁷ This includes the construction of a new turf field, academic space and classroom upgrades, as well as IT upgrades. This is a large capital investment in a given year, relative to the average annual expenditures observed in this Study (i.e., \$15.1 million over five years, or an average of \$3.0

¹⁵ Expenditures incurred in each of the fiscal years sampled were adjusted to 2016 dollars

¹⁶ Nipissing University

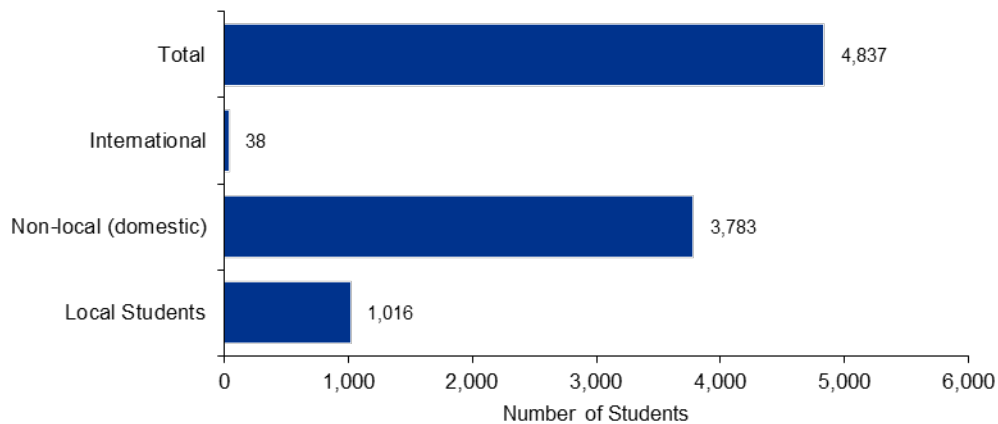
¹⁷ Nipissing University

million per fiscal year). For the purposes of this Study, KPMG estimated only the economic impacts of capital expenditures already incurred by the University. As such, economic impacts of Nipissing’s planned capital investments in 2017-18 are not analyzed or reported on in this Study. Given the higher capital expenditures observed in 2017-18 relative to the five-year average, economic impacts during this current year are likely to be even higher than the average annual amounts calculated from our analysis.

3.3.3 Non-Local and International Student Expenditures

Approximately 79% of Nipissing students are not from the North Bay region.¹⁸ Of these students, almost all (99%) come from another part of Canada, while the remaining are international students.¹⁹ A summary of local, non-local (domestic), and international students enrolled at Nipissing for the 2016/17 school year is provided in the figure below.

Figure 13. Number of Students at Nipissing in 2016-17 by Origin



Source: Nipissing University

Living expenses of non-local and international students were estimated based on figures from the Student Financial Services Office. A summary of these expenses are summarized in Figure 14. Expenses incurred by non-local and international students attending Nipissing are substantially made in the local community; including for housing, food, books and supplies, and other personal expenses.²⁰ As presented in the following figure, it was estimated that non-local and international students, in total, spent approximately \$44.3 million in the North Bay region in 2016-17.

¹⁸ Nipissing University

¹⁹ Ibid

²⁰ It is important to note that tuition and ancillary fees paid by non-local students are not included since these are revenues to the University and their impacts are captured in the University’s operating expenditures

Figure 14. Non-Local Student Living Expenses (\$)

	Non-local (domestic) student annual costs	International student annual costs	Total non-local (domestic) student annual costs	Total international student annual costs	Total
Housing	\$5,414	\$5,828	\$20,481,162	\$64,714	\$20,545,876
Food	\$2,200	\$2,600	\$8,322,600	\$221,464	\$8,544,064
Books and Supplies	\$750	\$750	\$2,837,250	\$98,800	\$2,936,050
Personal	\$3,250	\$2,500	\$12,294,750	\$28,500	\$12,323,250
Total	\$11,614	\$11,678	\$43,935,762	\$413,478	\$44,349,240

Source: Student Financial Services Office; KPMG Calculations

Note: Non-local (domestic) annual costs per student were calculated by KPMG by taking the average of costs for students living in residence and students living off campus

3.3.4 Visitor expenditures

Each year, Nipissing welcomes visitors from outside North Bay for a variety of events such as conferences, campus visits, convocations, as well as arts and athletic events. Since precise data on the number of visitors to the University were limited, it was conservatively assumed that non-local students attending Nipissing from the rest of Ontario and Canada typically had two visitors on average and international students had one visitor on average each year. We used this to calculate the total number of friends and family visitors to the University.

Tourist spending by friends and family visitors was estimated based on the Ontario Ministry of Tourism, Sport and Culture – Region 13a (North Eastern Ontario) visitor spending and visits data for 2015. These values were inflated to reflect 2016 dollars.²¹

A summary of calculated visitor expenditures to the North Bay Region as a result of Nipissing is summarized in Figure 15.

²¹ Statistics Canada, Consumer Price Index, Ontario, All items, CANSIM Table 326-0020

Figure 15. Estimated Visitor Expenditures

	Non-Local students	International students	Total
Number of Students	3,783	38	3,821
Number of Visitors per Student	2	1	-
Total Number of Visitors	7,566	38	7,604
	Non-local visitor spending/person	International visitor spending/person	Total visitor expenditures
Accommodation	\$40.2	\$474.0	\$322,277
Public & Local Transportation	\$31.0	\$12.1	\$235,306
Vehicle Rental & Operations	\$50.1	\$75.1	\$381,714
Food and beverage at stores	\$18.4	\$75.4	\$141,807
Food and beverage at restaurants/bars	\$52.6	\$122.4	\$402,837
Recreation/entertainment	\$20.9	\$22.8	\$158,858
Retail/other	\$32.6	\$50.5	\$248,520
Total	\$245.8	\$832.4	\$1,891,319

Source: Nipissing University; Ministry of Tourism, Culture and Sport, Region 13a Regional Tourism Profile (2015); Statistics Canada, Consumer Price Index, Ontario, All items, CANSIM Table 326-0020, 2015 to 2016; KPMG Estimates

Note: Average number of night for the visits to Region 13a is 3 nights.

3.4 Results

The following table summarizes the total economic impact (direct, indirect and induced) as a result of Nipissing's expenditures within the Canadian economy.

Figure 16. Summary of Total Employment, GDP, Labour Income and Employment Impacts Related to Nipissing on the Total Canadian Economy

	Annual – Canadian Economic Impact				Over 5 Years
	Operating Expenditures	Non-Local Student Spending	Friends and Family Visitor Spending	Total	Capital Expenditures
Employment Impact (FTEs)	741.3	461.2	26.4	1,228.8	159.9
GDP Impact (\$ millions)	112.1	49.2	2.1	163.3	15.7
Labour Income Impact (\$ millions)	68.8	25.2	1.2	95.2	10.7

Note: (a) Totals may not add due to rounding. (b) Jobs are expressed in terms of full-time equivalent positions. Source: KPMG Calculations; Statistics Canada Interprovincial Input-Output (2010) multiplier table

As presented in the table above, Nipissing has significant impacts on the Canadian economy in terms of both employment and value-add generated. In total, Nipissing creates approximately 1,229 FTEs and contributes about \$163 million in GDP to the Canadian economy on an annual ongoing basis through its operating expenditures. Additionally, Nipissing created approximately 160 FTEs and contributed about \$15.7 million in GDP over the past five years from its capital expenditures. Further breakdowns of impacts (i.e., direct, indirect and induced; incurred in Ontario and Canada) are described in following sub-sections.

3.4.1 Economic Impact of Annual Expenditures

In this section, the impacts of annual operating expenditures, student and visitor spending are described in terms of employment, GDP and labour income as estimated using the Statistics Canada Input-Output multiplier tables.

3.4.1.1 Employment Impacts

Annual expenditures related to Nipissing were estimated to generate approximately 1,229 FTEs in Canada, of which 1,151 were in Ontario. Within this overall employment total, Nipissing directly employed a total of about 440 faculty and administrative and support staff in 2016-17. Additionally, it is estimated that 112 jobs were generated/supported indirectly among suppliers and suppliers to suppliers of Nipissing as a result of its operating expenditures. An additional 268 direct and 137 indirect jobs were created as a result of non-local student living and visitor expenditures.²² Induced impacts resulting from spending of salaries and wages by Nipissing faculty and staff as well as direct and indirect suppliers resulted in an additional 271 jobs in Canada.

Figure 17 summarizes the employment impact of annual expenditures related to Nipissing:

²² The figure 268 is the sum of 251.6 and 16.8 from Figure 17. Similarly, 137 is the sum of 131.4 and 5.8.

Figure 17. Employment Impact of Operating, Student Living and Visitor Expenditures (FTEs)

	Operating Expenditures		Non-Local Student Expenditures		Visitor Expenditures		Total	
	Ontario	Canada	Ontario	Canada	Ontario	Canada	Ontario	Canada
Direct	440.0	440.0	251.6	251.6	16.8	16.8	708.3	708.3
Indirect	96.1	112.3	117.1	131.4	4.8	5.8	218.0	249.5
Induced	157.6	189.0	63.6	78.2	3.1	3.8	224.3	270.9
Total	693.7	741.3	432.3	461.2	24.6	26.4	1,150.7	1,228.8

Note: (a) Totals may not add due to rounding. (b) Jobs are expressed in terms of full-time equivalent positions.
Source: KPMG Calculations; Statistics Canada Interprovincial Input-Output (2010) multiplier table

3.4.1.2 Labour Income and GDP Impacts

Annual expenditures related to Nipissing generated about \$163.3 million of GDP in Canada, of which \$154 million was observed in Ontario. Labour income is a subset of GDP and accounted for \$95 million and \$91 million of GDP in Canada and Ontario, respectively.

The following figure summarizes the labour income and GDP impacts of annual expenditures related to Nipissing and shows that while the University's operations have a large economic impact, non-local students from outside North Bay play a large role in generating economic impacts to the region.

Figure 18. Labour Income and GDP Impacts of Operating, Student Living and Visitor Expenditures (\$ millions)

	Operating Expenditures		Non-Local Student Expenditures		Visitor Expenditures		Total	
	Ontario	Canada	Ontario	Canada	Ontario	Canada	Ontario	Canada
GDP Impact (\$ millions)								
Direct	\$78.8	\$78.8	\$26.1	\$26.1	\$1.0	\$1.0	\$105.9	\$105.9
Indirect	\$8.6	\$10.7	\$12.1	\$13.8	\$0.5	\$0.6	\$21.1	\$25.1
Induced	\$19.0	\$22.6	\$7.6	\$9.3	\$0.4	\$0.5	\$27.1	\$32.3
Total	\$106.4	\$112.1	\$45.8	\$49.2	\$1.9	\$2.1	\$154.1	\$163.3
Labour Income Impact (\$ millions)								
Direct	\$52.9	\$52.9	\$12.3	\$12.3	\$0.6	\$0.6	\$65.8	\$65.8
Indirect	\$5.1	\$6.0	\$7.5	\$8.5	\$0.3	\$0.4	\$12.9	\$14.8
Induced	\$8.3	\$9.9	\$3.7	\$4.5	\$0.2	\$0.2	\$12.1	\$14.6
Total	\$66.2	\$68.8	\$23.5	\$25.2	\$1.1	\$1.2	\$90.8	\$95.2

Note: Totals may not add due to rounding. Jobs are expressed in terms of full-time equivalent positions.
Source: KPMG Calculations; Statistics Canada Interprovincial Input-Output (2010) multiplier table

3.4.2 Economic Impact of Capital Investment

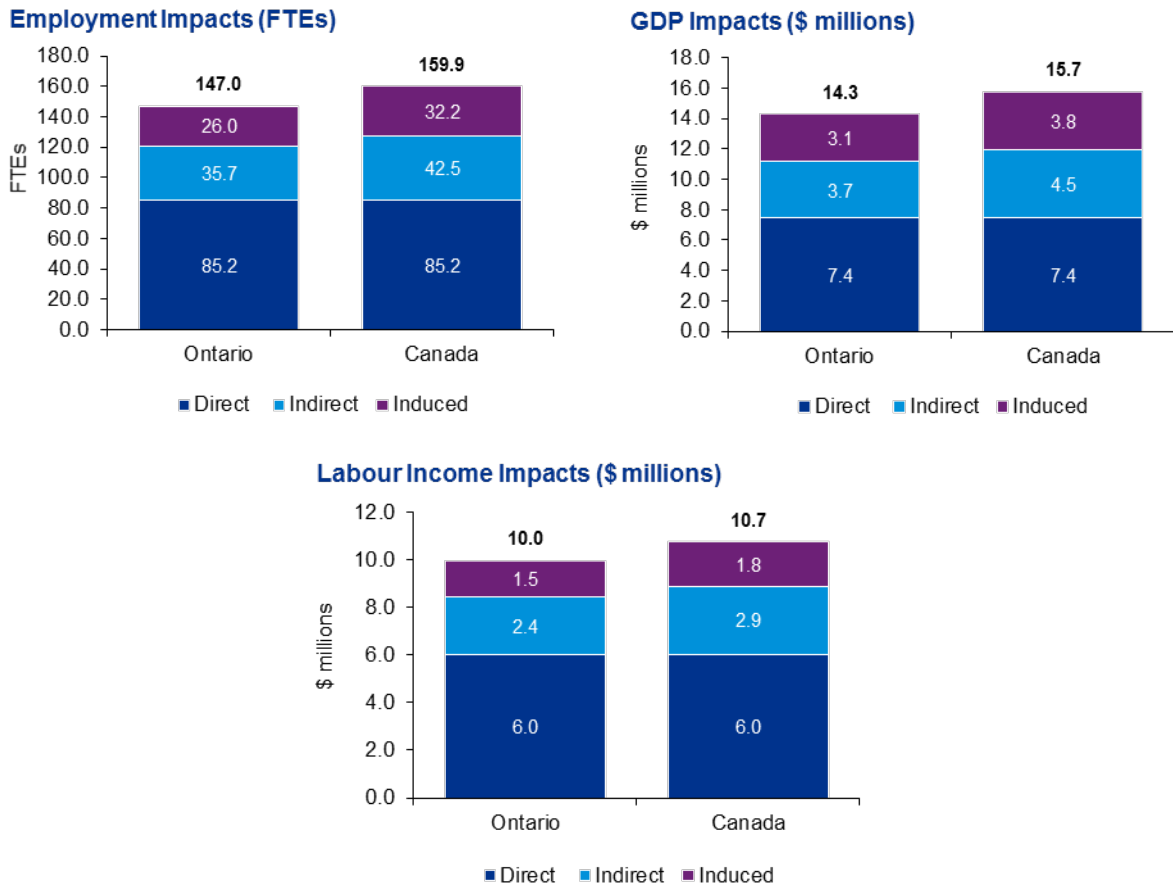
Based on information on capital projects provided by Nipissing, KPMG estimated the economic impacts of Nipissing's capital expenditures over five years, between 2013 and 2017. Capital expenditures for the five years totaled \$15.1 million (in 2016 dollars) and included construction of new

buildings, major building renovations, and funding for ancillaries such as furniture, computers and other equipment.

As previously mentioned, Nipissing noted its plans to undertake capital investments totaling \$5.5 million in 2017-18. For the purposes of this Study, KPMG only estimated the economic impacts of capital expenditures already incurred by the University. As such, economic impacts of Nipissing's planned capital investments in 2017-18 are not analyzed and reported on in this Study.

The following figure shows the details of employment, GDP and labour income impacts in both Ontario and Canada as a result of Nipissing's investment in capital in between 2013 and 2017.

Figure 19. Employment, GDP and Labour Income Impacts from Nipissing's Capital Expenditures over Five Years (2013 to 2017)



Source: KPMG Calculations; Statistics Canada Interprovincial Input-Output (2010) multiplier table

The capital investments by Nipissing over the past five years are estimated to have created 147 FTEs in Ontario and a total of 160 FTEs in Canada. This investment created a total GDP impact of \$14.3 million in Ontario (\$15.7 million, in total, in Canada). Of this amount, \$10 million was attributed to labour income in Ontario (\$10.7 million in Canada).



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The analysis in this section captures the quantifiable economic impacts that Nipissing has on the provincial and national communities; however, this is not the whole picture. The next section addresses the qualitative impacts of the University, which typically are less readily quantifiable in comparison. This qualitative component considers the socioeconomic benefits generated by the University, including those related to Nipissing's role in bolstering student experience, academic and research excellence, and faculty and student engagement within the community.

4 Socioeconomic Impact Analysis

A university enhances the intellectual, research and employment attributes of a city and enriches the economy by developing human capital for the regional labour market. Nipissing University's impacts are readily observed in the City of North Bay and its surrounding region, and further extend into the Province and internationally.

This section presents the results of our qualitative economic impact analyses based on stakeholder interviews, document reviews and secondary research. Socioeconomic impacts stemming from Nipissing's role as an experience provider, an educator, and its integral role in the community are summarized and presented in this section.

Interviews conducted with various stakeholders from the University generally point to a wide range of impacts related to community-building and delivery of enhanced student experience. These activities and programs offered by Nipissing, though varied over the past years, bring various socioeconomic impacts to the City of North Bay and greater northern Ontario region. In general, it was observed that these socioeconomic impacts are also in line with Nipissing's 2015 Strategic Plan, which set out a number of key focus areas, including striving for academic and research excellence, enhancing student experience, and ongoing community engagement.

4.1 Academic and Research Excellence

Research excellence has increasingly become a priority for the University and, as a result, Nipissing has grown its pool of research fellows significantly over the past decade. Nipissing University has developed a strong research culture cemented by an impressive publication record, research grants and government and industry funding. The University's success in research has allowed for the development of graduate programs such as a PhD Program in Education and Master's programs in Education, History, Environmental Science, Environmental Studies, Applied Sociology, Mathematics and Kinesiology.

As presented in Figure 8 in Section 2 of the Report, Nipissing was awarded over \$2 million in research funding in 2016-17. The University has also seen an increase of 47% in tri-council funding and grants received since 2011-12.²³ Research at the University covers a broad range of the topics, from environment and climate change to Indigenous histories. A number of faculty research initiatives involve collaboration with other universities and institutions nationally and internationally. These collaborations elevate Nipissing's profile as a research institution. This section speaks to the socioeconomic impacts from the University's pursuit to enhance its academic and research excellence.

In its 2015 Strategic Plan, Nipissing set out to enhance its academic and research culture by:

- Encouraging and supporting academic excellence, focusing on quality, innovative pedagogy, and accessibility;

²³ Strategic Mandate Agreement, 2017-20, Draft Submission Template between the Ministry of Advanced Education and Skills Development and Nipissing University

- Fostering an environment that actively supports research and creative production with an emphasis on innovation, collaboration, and student participation;
- Supporting faculty research and graduate programming to become a destination for research and collaboration nationally and internationally.²⁴

Human Capital Development

Educators' view of human capital development is that it can increase the level of capacity that an individual has, thereby leading to improvements in employment, earnings, health, and other outcomes in adulthood.²⁵ Universities, in general, play a critical role in developing human capital; not just locally or domestically, but globally.

Nipissing plays a critical role in developing human capital, specifically in the North Bay region and northern Ontario. As presented earlier in Figure 7 of section 2, over 90% of students find employment within six months of graduating (compared to the average of 87% for Ontario universities). After two years, approximately 96% of students find employment (compared to the average of 94% of Ontario universities). Anecdotally, Nipissing's approach to integrating applied and experiential learning components have contributed to its students' employability. Examples of this include:

- **Teaching Practicum** – Students in the Bachelor of Education Program are required to do 19 weeks of practicum in school classrooms as part of the degree requirements. This provides students with hands-on, teaching experience in a classroom setting.
- **Registered Practical Nurse (“RPN”) to Bachelor of Science in Nursing (“BScN”) Blended Learning Program** – This program gives RPNs the opportunity to upgrade their nursing credential to a BScN. It comprises online courses and applied clinical experience provided in partnership with over 300 health care institutions across Ontario. Since the program is delivered part time, it gives mature working students the flexibility to continue work while also upgrading their credentials.
- **Internships and placements** - Students in Arts and Science programs such as social work, Biology, Geography, Gender Studies, or Criminology and Criminal Justice, among others, engage in experiential learning through internships and work and education placements in the local community. The business school also runs the Innovation Initiatives Ontario North (“IION”), and Youth entrepreneurship Placement Program (“YEPP”). These are funded by Federal Economic Development Initiative for Northern and Rural Ontario (“FedNor”) and Ontario Trillium foundation to provide internships for business students interested in innovation and entrepreneurship.
- **Summer Institutes** - Students in all faculties are encouraged to participate in summer institutes that take place in online, onsite, and/or blended formats and that include an experiential component. The institutes are accelerated, condensed courses teaching students how to respond to and engage with the challenges and realities of the workforce.
- **International Learning Experiences.** Students have the opportunity to partake in international placements to practice and enhance their knowledge in new and diverse environments such as

²⁴ Nipissing University, Strategic Plan, 2015-2020

²⁵ Rolnick, Arthur J. and Rob Grunewald (2003). Early Childhood Development: Economic Development with a High Public Return. The Federal Reserve Bank of Minneapolis Gazette, March 2003.

Australia, Cameroon, China, Ecuador, Egypt England, Germany, Italy, Jamaica, Kenya, Mexico and the USA.²⁶

- **Biidaaban Community Service-Learning Program** – An Indigenous initiative where Students are immersed at non-for-profit organizations and other community organizations in projects or activities.

Nipissing has formed partnerships with organizations across Ontario to help diversify and increase the quality of undergraduate and applied, professional-level experiential learning programs offered. For example, Nipissing University has partnered with organizations such as University Health Network, Toronto Public Health, and SickKids to deliver a distance program in Nursing. Another example is Nipissing’s partnerships with the Ontario Provincial Police and a number of other police and correctional agencies to deliver experiential learning for its Criminal Justice’s Police Foundations Program.

A sample list of organizations that the University is involved with to enrich the students’ experience is presented below:

Figure 20. Sample of Nipissing Partnerships with Organizations

Chartered Professional Accountants of Ontario (“CPA”)	University Health Network
Human Resources Professional Association (“HRPA”)	Toronto Public Health
Canadian Marketing Association (“CMA”)	Centre for Addiction & Mental Health (“CAMH”)
North Bay Police Service	Toronto East General Hospital
Military Police	Royal Ottawa Hospital
Ministry of Community Safety & Correctional Services	Nipissing First Nation Health Services
Canadian Border Services Agency	Thunder Regional Health Sciences
Correctional Services Canada	North Bay Regional Health Centre
Children’s Right’s Academic Network (“CRAN”)	Algonquin College
Canadian Anti-Fraud Centre	Niagara College
Children’s Aid Society	Canadore College
Biomass North Development Centre	Lambton College

Nipissing University also offers a wide range of college partnerships, which further support knowledge sharing and human capital development. The most extensive Nipissing-college partnership is with Canadore College (“Canadore”). Canadore and Nipissing share a campus and human resources team, making it easy to collaborate between the two institutions. Together, Nipissing and Canadore have developed a number of fully integrated program offerings that allow students to obtain a Bachelor’s degree as well as a College Diploma. Joint degree and diploma programs offered between Nipissing and Canadore include:

- Criminal Justice (Nipissing) and Foundations of Policing (Canadore);
- Social Welfare and Development (Nipissing) and Social Services Worker (Canadore); and
- Environmental Biology (Nipissing) and Technology (Canadore).

²⁶ Strategic Mandate Agreement, 2017-20, Draft Submission Template between the Ministry of Advanced Education and Skills Development and Nipissing University

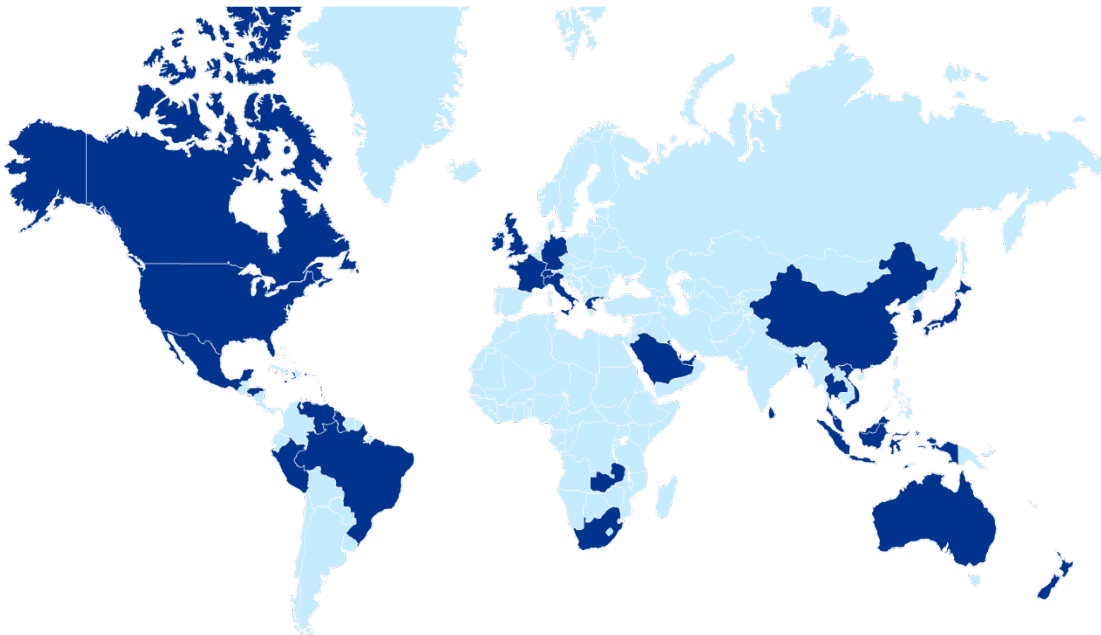
Through this partnership with Canadore, students enrolled at Nipissing are able to obtain undergraduate degrees as part of a joint program offered at Canadore College – offering the flexibility and accessibility of programs to a wider range of students. Nipissing also partners with many other colleges across the province for the delivery of degree-completion pathways. These pathways provide college students with the opportunity to continue studying at that campus while they upgrade to a university degree in as little as 12 months.

Programs with integrated experiential learning components are opportunities for students to utilize learnings from classroom syllabuses in an applied setting, which increases tangibility of knowledge and skills taught. Anecdotally, these opportunities have provided students with career preparedness, giving them some competitive edge as they get ready to enter the workforce. Ultimately this enhances the workforce-readiness of students graduating from Nipissing and thus enhances the overall quality of human capital developed through programs delivered by Nipissing.

The success of Nipissing’s human capital development is reflected in its alumni. Over 70% of Nipissing alumni who participated in the Nipissing Alumni Survey are in full-time employment. This figure rises to 85% when taking into account those who are employed part time or seasonally. Further, over 50% of respondents are working in a position directly related to their field of study and almost 75% of the respondents expressly said that Nipissing prepared them for developing a career or provided work-related knowledge and skills.

While the majority reside in Canada, Nipissing’s alumni have a presence across the globe. The following figure presents a map of Nipissing’s alumni network (shaded in dark blue).

Figure 21. Map of Active Alumni Presence Including Canada



Source: Provided by Nipissing University

Bringing Research and Innovation to Northern Ontario

As part of its strategic mandate, Nipissing aims to be community driven and regionally relevant, which is evident among its research initiatives. Researchers within the Schulich School of Education have conducted research in the community to explore implications of assistive technologies on the writing abilities of students with learning disabilities. Additionally, researchers from the Office of Indigenous Initiatives are conducting on-going consultation with Nipissing First Nation to develop community-based research. One of the researchers is also acting as consultant with the North Bay Parry Sound District Health Unit to examine the perceived health service needs of the homeless population in urban North Bay. The School of Nursing also undertakes health research in a variety of settings within the community. The Department of Social Work is conducting research with the Alzheimer Society of Sudbury-Manitoulin and North Bay and the Muskoka Parry Sound Sexual Assault Services.

Department of Social Work researchers are also part of a SSHRC funded research partnership among Nipissing University, Amelia Rising Sexual Assault Centre of Nipissing, the Union of Ontario Indians, and the AIDS Committee of North Bay and Area. This partnership aims to map patterns of exploitation and community resilience with regard to sex trafficking in northeastern Ontario.

As another example of applying the universities' research capabilities to support the viability of the region, Nipissing researchers have undertaken research to enhance the productivity of the farming industry in northern Ontario. This initiative involves collaboration across Nipissing's Geography, Computer Science, and Mathematics departments, and Agriculture and Agri-Foods Canada ("AAFC") in exploring remote sensing and environmental monitoring technologies to increase crop productivity.²⁷

Other researchers have been involved in a project, in partnership with the City of North Bay and Nipissing First Nation, to increase the environmental viability of Lake Nipissing.²⁸ Presentations from Nipissing research experts provided the motivation for an MOU signed by mayors of all communities bordering the lake to work towards protecting the lake's sustainability.²⁹ Further, research staff and students are also assisting in the development of a strong biomass industry in northern Ontario. Research efforts in this respect involve working with organizations to identify biomass supply opportunities in the forestry and agricultural sectors and supporting initiatives to develop market capacity and demand for bio-fuels and bio-refinery products.³⁰

4.2 The Student Experience

Nipissing is a primarily undergraduate institution that focuses on student success. This is reflected in recurring years of above-average responses, compared to peer institutions in Ontario, from student experience surveys.

Among these ratings, Nipissing has generally been rated favourably in meeting student satisfaction. In continuing these efforts, Nipissing has further set out to enhance the student experience in its 2015 Strategic Plan by:

²⁷ May 26, 2017 Senate Agenda and Documents

²⁸ May 26, 2017 Senate Agenda and Documents

²⁹ May 26, 2017 Senate Agenda and Documents

³⁰ Nipissing University Strategic Mandate 2012

- “Creating access to opportunities at the University , especially for students from northern communities, and Aboriginal, first generation, and international learners;
- Creating opportunities outside of the classroom encompassing athletics, the arts, culture, entertainment, and healthy and active living; and
- Encouraging diversity in its student body, faculty, and staff.”³¹

This Section speaks to socioeconomic impacts as a result of the University enhancing its student experience.

Accessibility to Post-Secondary Education in Northern Ontario

Nipissing's location in northern Ontario offers an opportunity for prospective students from neighbouring municipalities and regions to attend university without having to travel far away from home. This is particularly important and relevant for Indigenous communities in northern Ontario.

Further demonstrating the accessibility and diversity of enrollment in Nipissing's programs, its current enrollment demography includes a large percentage of female (72%), First Generation (10%) and Aboriginal (10%) students, as well as students following non-traditional pathways (e.g., students with disabilities, college transfers, professionals, mature students).³² This is partially supported through Nipissing accepting special enrollment cases with lower entrance averages, alongside a commitment to not affect the quality of education delivered to any student.

Nipissing has developed multiple institutional initiatives to support inclusive access to a diverse student population. In particular, 10% of the student population at Nipissing self-identify as Indigenous students. Nipissing offers the Aboriginal Advantage Program, which provides academic, cultural and personal support to assist a smooth transition into the University. The program is an initiative of Nipissing's Office of Indigenous Initiatives, in collaboration with the Faculty of Arts and Science. Other key initiatives that specifically address and support inclusion for Indigenous students include³³:

- **Wiidooktaadwin Indigenous Mentorship Initiatives** – a peer mentorship program to support Indigenous youth in secondary school and to encourage the transition to post-secondary education. This program includes an on campus Indigenous Youth Leadership Conference organized twice annually.
- **Summer Aboriginal Education Programs** – low-residency Education programs delivered on campus in the summer and practicum taking place in students' home communities (Aboriginal Teacher Certification program, Teacher of Anishnaabemwin as a Second Language program, and Aboriginal Classroom Assistant Diploma Program)

Nipissing also engages in broader partnerships with Indigenous communities to improve student learning. Currently, the University is working in collaboration with Indigenous institutions to give students the ability to take courses while remaining in their communities to study. Past partnerships have included Kenjigewin Teg Educational Institute on Manitoulin Island, and Mushkegowuk Council in James Bay.

³¹ Nipissing University, Strategic Plan, 2015-2020

³² Strategic Mandate Agreement, 2017-20, Draft Submission Template between the Ministry of Advanced Education and Skills Development and Nipissing University

³³ Provided by Nipissing University through 2017 Senate Agenda and Report of the Planning and Priorities Committee

Current partnerships for the delivery of community-based Aboriginal Classroom Assistant Diploma Program include:

- Bimose Tribal Council in Kenora
- Oshki Pimache-O-Win Education and Training Institute in Thunder Bay
- **Summer Aboriginal Education Programs** – accessible programs for delivering educational programs in Indigenous communities

Nipissing also engages in broader partnerships with the Indigenous community to improve the student learning. Currently, the University is working in collaboration between First Nations institutions to give students the ability to take courses while remaining in their communities to study. These institutions include:

- Kenjgewin Teg Educational Institute on Manitoulin Island,
- Mushkegowuk Council in James Bay, and
- Bimose Tribal Council in Kenora

4.3 Community Engagement

Nipissing's strategic decisions on student experience, academic, and research perspectives are grounded in its commitment to developing the North Bay region and northern Ontario. As such, the socioeconomic impacts from Nipissing's community engagement touch other aspects of its strategic priorities.

In its 2015 Strategic Plan, Nipissing set out to enhance its community engagement by:

- “Embracing the communities served by the University and developing meaningful partnerships of mutual benefit;
- Developing the strengths of each of our campuses and ensure access to academic and extra-curricular opportunities;
- Enhancing our capacity as engines of economic, social, and cultural development for our communities in an environmentally sustainable manner.”³⁴

This Section speaks to socioeconomic impacts as a result of the University's efforts to enhance its community engagement.

Economic Development in Northern Ontario

With over 350 partnerships, Nipissing University takes on more than just the role of a primarily teaching university in the community. It also plays a significant role in the broader economic development objectives set out by FedNor to **build strong and sustainable communities**. Nipissing addresses and supports these goals through human capital and local workforce development, community involvement, and involvement in indigenous affairs.

³⁴ Nipissing University Strategic Plan, 2015-2020



As referenced in section 4.1, Nipissing researchers are working with industry associations to facilitate the development of the northern Ontario region. For example, in partnership with AAFC and local farmers, Nipissing researchers have been undertaking important research to help enhance the viability of the farming industry in northern Ontario and other researchers are involved in an initiative to enhance the environmental viability of Lake Nipissing in collaboration with the City of North Bay and Nipissing First Nation.

In addition, Nipissing is currently expanding its facilities to add cutting edge research laboratories to support regional priorities in health and wellness. These laboratories will facilitate the many clinical and health-related research initiatives run by the University, as well as by experts at the North Bay Regional Health Centre, One Kids Place Children's Treatment Centre, the Ontario Provincial Police ("OPP") and other regional health and social service agencies.

Local Economic and Workforce Development

As discussed earlier in Section 4.1.1 of the Report, Nipissing plays a critical role in developing human capital, specifically in the North Bay region and northern Ontario. From both local and regional perspectives, Nipissing has been a source of skilled labour supply for the region, particularly in the public sector, such as for teaching and nursing.

In order to remain relevant to the region's healthcare needs, Nipissing has expanded its offerings to three nursing programs to include further education for professional nurses. This has resulted in local organizations such as the local health centre benefiting from a consistent stream of professional nurses. Further to this, programs such as the criminal justice and social work programs have been set up specifically in order to address labour demands in these industries. For example, when there was a need identified for social workers in northern Ontario, Nipissing University built a program to educate and supply future social workers to meet these needs.

In addition to adapting to local and regional labour demands, Nipissing monitors trends related to the future of the local workforce and is constantly adapting and evolving its curricula and collaborations to deliver relevant programs and develop human capital with key skills to the benefit of the community. The University is hence seen as an institution that is integrated within the community, solving its needs by "providing the brains" in its local workforce.

Employees and Students' Involvement in the Local Community

Through involvement by its students, faculty and staff, Nipissing is active in community building in the region. Relationships are built through collaboration and partnership with industry or other educational institutions, building a vibrant community in the City.

The student population in Nipissing is active in local organizations, for example, mentoring Indigenous youth, fundraising for charities, and organizing book drives for a local literacy program. In addition, Nipissing's students raise awareness on social issues, by volunteering at the local soup kitchen, and executing the North Bay Pride Parade. Nipissing's students also impact the global community through international practicums, international exchanges, studying abroad and the University's iLead programs which offers business students the opportunity to earn credits toward their degree through workplace internships, overseas study and service to others.³⁵

³⁵ "Student Involvement in the Community"



Faculty and staff are also involved members of the community, dedicating a portion of their time to service, as volunteers and board members of local organizations, such as Hands (Local Family Help Network), Gallery Hop (promoting arts and culture) and Health Quality Ontario. Students and faculty are also jointly involved in extracurricular programs, such as Engineering summer camps and Math Circles. The Math Kangaroo international competition, for example, helps generate local community interest and global exposure, further promoting the brands of the University and the City of North Bay. In addition, Nipissing's Mobile-Experiential Leadership Development (MELD) summer program offers insight to high schools students in how they can use technology to improve their academic success and prepare them for post-secondary education.

Specific faculties have also formed partnerships with community-based organizations to the benefit of local residents. For example the Department of Social Work has formed a Community Advisory Circle with the Children's Aid Society, Near North District School Board, Community counselling Centre, and the Canadian Mental Health Association. The Physical and Health Education Program has partnered with the Granite Club to offer introductory curling lessons to the community.

There are further public impacts as a result of the capital investments made by the University. The state-of-the-art Harris Learning Library is open to the public and helps to build literacy in the community and encourages community collaboration. Funding for the Library included a benefaction from Schulich, provincial funding, and Nipissing University's and Canadore College's fundraising campaign. The University is also looking into building a turf field in order to support the soccer association, which can bring the community together through sport. The Nipissing University hockey teams support the North Bay arena as a tenant, which results in securing a more consistent use of the arena and revenue for the City of North Bay.

Nipissing has also collaborated with the visual media industry, especially in regard to television and film. It has been the location of a number of television programs and film projects, which has spurred collaboration between the City of North Bay and the Faculty of Arts and Science to further attract and cater to the demand from the film industry. The faculty is working closely with the City on a pathway that will connect film producers interested in North Bay film projects and that will cater to the needs of the film industry by providing courses in screen writing, film analysis, digital and film production as summer institutes, standalone certificates and/or non-credit continuing education. In the absence of Nipissing, it would have been challenging to attract talent outside of North Bay and thus provide continued growth.³⁶

Indigenous Community Engagement

The City of North Bay has a strong urban Indigenous community with a long history. Nipissing's programs and support services are in part shaped by regional Indigenous community voices, including First Nations Education Directors and urban Indigenous service organizations that are members of the Nipissing University Aboriginal Council on Education (NUACE). The NUACE advises Nipissing in the development of programs and initiatives that impact Indigenous students and communities. Programs currently in development include the areas of Aboriginal Education, Aboriginal Governance/Public Administration, Rural Nursing (with a focus on Aboriginal Nursing), Indigenous Archaeology, Environmental Geoscience, Human Rights and State Violence and Social Work.

³⁶ Strategic Mandate Agreement, 2017-20, Draft Submission Template between the Ministry of Advanced Education and Skills Development and Nipissing University



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Nipissing builds and strengthens connections with Indigenous communities by actively participating in discussions facilitated by the Office of Indigenous Initiatives. The seventh and current President of Nipissing University chairs on the Reconciliation North Bay committee and is the founding Executive Director of the Aboriginal Healing Foundation, a national organization which addresses the legacy of Indian Residential Schools.

Nipissing supports community needs while providing experiential learning opportunities for its students. Specifically, the Biidaaban Community Service-Learning program supports students in volunteer placements with local not-for-profit community organizations, including schools. A specialized focus of the Biidaaban Community Service-Learning program is to support First Nation, Metis and Inuit students in grades K-12 through after school programs, early learning and anti-bullying sessions and classroom support to increase literacy and numeracy and after-school homework programs in partnership with Nipissing First Nation, the North Bay Indigenous Friendship Centre, at Nipissing Secondary School, Near North Schools and Nipissing/Parry Sound Catholic District School Board. Nipissing students who volunteer in the Biidaaban Community Service-Learning program broaden their experiences in and with Indigenous communities and organizations and build deeper understandings of Indigenous peoples, communities and cultures.

Wiidooktaadwin Indigenous Mentorship Initiatives (“WIMI”) Program

The WIMI program is a peer mentorship program for Indigenous university students building community with Indigenous secondary school students in a program that includes two Indigenous Youth Leadership Conferences on campus each academic year.

5 Conclusion

With an increasingly diverse academic offering, leveraging key strengths in postsecondary education and a growing graduate program with strong research capacity, Nipissing makes a significant contribution to the local, provincial and national economies. This is demonstrated through both the economic and social impacts that are created as a result of Nipissing's operating and capital expenditures and its student and visitor spending, human capital development, research and innovation, and community engagement.

The following is a summary of key quantifiable impacts made by Nipissing:

- Over the past five years, the University spent approximately **\$15.1 million on capital projects and purchases**.
- The capital investments by Nipissing over the past five years are estimated to have created **147 FTEs in Ontario** and a total of **160 in Canada**. This investment created **total GDP impact of \$14.3 million** in Ontario (\$15.7 million in Canada).
- In 2016-17, Nipissing spent **\$87.1 million** on its operations. As a result of Nipissing, it is estimated that non-local and international students spent approximately **\$44.3 million** in the North Bay region, while visitors to these students spent **\$1.9 million** in 2016-17.
- Annual expenditures by and as a result of Nipissing were estimated to generate approximately **1,229 FTEs in Canada** of which 1,151 FTEs were in Ontario. These expenditures were also estimated to contribute about **\$163.3 million to GDP in Canada** of which **\$154 million was incurred in Ontario**.

In addition to the quantifiable impacts above, Nipissing provides a number of other significant benefits to the communities it serves. Additional impacts are realized through the University applying its research capabilities to support the viability of the region, demonstrated through initiatives such as research to enhance the productivity of the farming industry in northern Ontario, a project to increase the environmental viability of Lake Nipissing; and research staff and students working to develop a strong biomass industry in the region.

Nipissing also plays a critical role in developing human capital, specifically in the North Bay region and northern Ontario. This is due in part to Nipissing's approach to applied and experiential learning, especially in relation to the teaching and nursing programs. Nipissing has formed partnerships with organizations across Ontario in order to deliver quality undergraduate and applied professional level experiential learning programs. The University also offers a wide range of college partnerships that further support knowledge sharing and human capital development. As a result, there are a number of Nipissing students that transfer from colleges or who are participating in a joint program with a college. As a result of these partnerships, Nipissing gives students the ability to use their knowledge in an applied setting and it gives them a competitive advantage as they enter the workforce. This human capital development also helps to support the local, regional and national workforces and Nipissing has been successful in expanding and tailoring its program offerings to meet the labour demands of the region.

Nipissing is active in community involvement and in building the region. The student population at Nipissing is involved in numerous local organizations and initiatives, for example, mentoring Indigenous youth, fundraising for charities, and leading the discussion on social issues. Faculty and



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staff members are also involved members of the community, dedicating a portion of their time to service, as volunteers and board members of local organizations.

Nipissing offers many public- and community-based partnerships, such as the state-of-the-art library, which provide community accessible services that benefit from the professional expertise of Nipissing's faculty and students. Moreover, on an annual basis, Nipissing attracts thousands of visitors to its campus through programmed events and activities for families and youth and for professionals who are building and maintaining their networks.

These impacts will continue to be key to Nipissing as it strives to strengthen its core program offerings, grow its research capabilities and post graduate programs, and recruit, educate and retain highly qualified faculty, staff and students.



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Appendix A: List of Stakeholders Interviewed

Name	Position
Cheryl Sutton	VP Finance & Admin
David Drenth	Director of Facilities
Debra Iafrate	Registrar
Harley d'Entremont	Provost & VP Academic and Research
Jim McAuliffe	Dean of Graduate Studies & Research
Kelly Brown	Manager of Marketing & Communications
Mike DeGagné	President
Murat Tuncali	Dean of Arts & Science
Rick Vanderlee	Dean of Applied & Professional Studies
Stephen Tedesco	Director Institutional Planning & Research
Ursula Boyer	Director, Finance



Appendix B: Interview Questions

Background

1. Please provide us with some background information on your role at Nipissing University.

Economic Impact of Nipissing University

2. What are the top impacts that Nipissing University has generated for the City of North Bay, Ontario, and/or Canada?

Please think about impact in terms of both economic wealth creation, as well as social improvement. Please consider different sources of impact - from financing capacity, knowledge and expertise of the faculty, students, alumni and partners, research and innovation, industry partnerships, community building abilities, civic engagement, and physical facilities.

3. Are you involved in any unique projects, partnerships, initiatives or policies that have a positive economic impact on the City of North Bay or neighbouring municipalities?
4. Please highlight any partnerships with industry leaders, specifically in the City of North Bay or neighbouring municipalities and/or Ontario.
5. What role has Nipissing University played to develop skilled labour to join the local workforce?
6. What are some of the examples of Nipissing University students' and faculty's involvement in the local community?
7. If Nipissing University did not exist, how would the City of North Bay or rest of Ontario be different?

City Building and the Role of Nipissing University

8. What are the top programs that student are enrolling in at Nipissing University?
9. In which industries/sectors do students commonly seek/find employment? How do you see this changing over the next ten years and how does Nipissing University adapt to this change?

Concluding Remarks

10. Is there any additional information we have not discussed that would be relevant to this report?



Appendix C: Glossary

AAFC	Agriculture and Agri-Foods Canada
ATCP	Aboriginal Teacher Certification Program
BScN	Bachelor of Science in Nursing
CAMH	Centre for Addiction & Mental Health
Canadore	Canadore College
CMA	Canadian Marketing Association
CPA	Chartered Professional Accountants of Ontario
CRAN	Children's Right's Academic Network
FedNor	Federal Economic Development Initiative for Northern and Rural Ontario
FTE	Full-Time Equivalent
GDP	Gross Domestic Product
HRPA	Human Resources Professional Association
I/O	Input-Output
IION	Innovation Initiatives Ontario North
MELD	Mobile-Experiential Leadership Development
Nipissing	Nipissing University
RPN	Registered Practical Nurse
Statistics Canada I/O Model	Interprovincial Input-Output Model of Statistics Canada
WIMI	Wiidooktaadwin Indigenous Mentorship Initiatives
YEPP	Youth entrepreneurship Placement Program



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