



University of Toronto

Office of the Assistant Vice-President, Campus and Facilities Planning

TO: Planning and Budget Committee

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DATE: August 30, 2007 for September 18, 2007

AGENDA ITEM: 10

Project Planning Report for the Expansion of the Rotman School of Management

JURISDICTIONAL INFORMATION:

Under the Policy on Capital Planning and Capital Projects, the Planning & Budget Committee reviews Project Planning Reports prepared for a capital project and recommends to the Academic Board approval in principle of the project.

BACKGROUND:

Business education has been offered at the University of Toronto for more than one hundred years, and became formally organized with the establishment of the Faculty of Management in 1971. In 1997, in recognition of a donation from Sandra and Joseph Rotman to support its vision and goals, the School was renamed the Joseph L. Rotman School of Management.

In 1998, following the appointment of Dean Roger Martin, the Rotman School's academic plan for the "Raising Our Sights" cycle (referred to as Plan 2004) outlined a competitive strategy for moving the Rotman School forward to a position of international distinction. The stated goal was to place among the top 20 business schools worldwide by the end of the planning period, and – even more ambitiously - among the top 10 within seven to ten years.

Much has been achieved since then. Strong support from the University, the Rotman Foundation and other donors, has allowed the Rotman School to build on academic strengths over the last seven years to significantly advance all the original objectives.

Building on the School's achievements, the current 'Stepping Up' Academic Plan outlines a range of new programmatic and research initiatives with the objective of moving forward decisively toward an even greater position of international recognition and ranking. The plan focuses on quality improvements, such as significant curriculum redesign, improved student experience, intensified recruiting efforts and improved selection criteria.

At the same time, the plan outlines a staged process of programmatic expansion, in line with the University of Toronto's overall objective of expanding graduate enrolments and research focus. After the 'Stepping Up' plan was completed, it was updated in light of the 'Reaching Higher' graduate expansion plans.

The enrolment expansion plans of the School are fully in line, and indeed have anticipated and pre-dated in part, the University's overall thrust towards graduate expansion. Much of the adjustment should be in place by the University's target date of 2009/2010 and it is expected to be completed fully by 2014.

The further expansion of the Rotman School's programs portfolio, combined with an increase in student numbers in all graduate programs which have been approved by the Vice-President and Provost, will necessitate an additional increase in faculty complement, beyond the target levels envisioned in Plan 2004. The intent is to grow the School's complement to a total of 146.80 FTE's by 2014. That would imply a further complement expansion of about 50% relative to the current faculty size of 97.51 FTE's.

In the new planning phase, the Rotman School will also further expand its broad research activities, organized around a significant number of research centers. Current research activities include the Institute for International Business, the University of Toronto Capital Markets Institute, the Centre for Finance, the Centre for Health Sector Strategy, the AIC Centre for Corporate Social Responsibility, the International Centre for Pension Management, and the Clarkson Centre for Business Ethics and Board Effectiveness. As well, the (reconstituted) Institute for Policy Analysis will find a new home within the University at Rotman. Other centres are planned, among several, in the areas of Leadership, Real Estate and Urban Economics, and Innovation and Entrepreneurship. These centres will give additional focus and international visibility to the School's research efforts.

HIGHLIGHTS:

The Rotman School of Management currently occupies approximately 5876 (9410gsm) within purpose built facilities located at 105 St. George Street. Since the time of its construction, the School has continued to grow its complement of faculty, students and staff and its programs. Some changes to the original building, including the addition of a 4th and 5th floor to the south wing have helped to accommodate growth somewhat, but are not sufficient to support the current or long-term plans of the school.

Space constraints have imposed severe limitations on student study space, research facilities, administrative services, and the capacity to offer executive non-degree programs. New facilities will allow existing shortcomings to be remedied and planned growth to be accommodated.

A preliminary space program that indicates the space needs of the Rotman School of Management in its envisioned steady state by 2014 was prepared and included in the Interim Project Planning Report approved in December 2006. This space program has been further refined and detailed and is now presented as a final program for the Rotman School on Site 11.

The proposed space program identifies a total of 13,280 nasm of space to be divided between the existing building at 105 St. George Street and a new structure on Site 11 to the south, thus expanding the Rotman complex. With 5880nasm of existing space and assuming that all of this space may be used fully to accommodate program, a proposed 7400nasm (~15,000gsm) additional space should be constructed to accommodate much of the School's planned growth.

In addition, this report includes a separate (preliminary) space program representing the anticipated space requirements of the Rotman School's Executive Development Programs (EDP). Limitations of Site 11 make it impossible to accommodate this part of the Rotman School space program on that site, and consequently EDP needs were not included in the interim report on Site 11. In this final report, the Executive Development Programs, including some affiliated research initiatives, have been identified as programmatic elements that should stand alone on a separate site within approximately 2800nasm (5600gsm) of space. Currently, the University and the Committee are considering sites on which to locate this program; Site 12 is one of the alternatives being considered, which could possibly locate the EDP with the proposed Varsity Centre for High Performance Sports and the proposed Student Commons.

Space requirements for the Commerce Program, offered jointly by the Rotman School and the Faculty of Arts and Sciences, have been separated entirely from the current project plan and will only be addressed once the current program redesign is completed and issues of the administration of the program are resolved fully. It has already been determined that any additional space requirements of the Commerce Program would not be accommodated within the expanded Rotman School complex.

The University of Toronto Area Secondary Plan identifies sites within the University of Toronto area which are available and have municipal approvals for development. Site 11, is located directly south of the Rotman School of Management building on the east side of St. George Street and is, therefore, well situated to accommodate further Rotman School space.

The site encompasses two existing buildings at 91 and 97 St. George and a surface parking lot. CIUT radio, and the Sexual Education and Peer Counselling Centre (SEC) occupy 91 St. George Street. Several options exist for CIUT Radio, including relocation to 256 McCaul Street to temporary or permanent accommodation. Space for CIUT is being contemplated in the Student Commons and was identified in the Interim Planning Report as was space for SEC. Ideally both activities will be located in the Student Commons . Both activities will be relocated to other space on campus as secondary effects of this project. In anticipation of this project the Classics Department, occupants of 97 St. George Street will vacate their current space shortly and relocate to the Lillian Massey Building as a separate initiative.

The City of Toronto Parking by-law for the University, requires that the St. George Campus maintains 2160 parking spaces. This site currently accommodates 44 surface parking spaces that will be displaced once construction begins. The parking spaces will be relocated across campus, in a variety of locations to maintain the required by-law spaces.

Current design guidelines require retention of the building facades of 91 and 97 St. George Street, while maintaining setbacks from surrounding heritage buildings including the Newman Centre and Church to the south, and Massey College to the east. The development parcel allows construction to a maximum height of 23m (5 stories).

The requirements identified in the space program for the Rotman School exceed the approved envelope capacity of the preferred development site (Site 11). To achieve the full program described in this report, an estimated 10 to 13 stories above grade, a development envelope to an approximate height of 37 to 51m would be required. Site planning consultants were retained in summer 2007 to assist in the review of the site. Preliminary analysis resulted in several options to be considered, but which will require municipal approvals. This site and others on the St. George campus are being examined as part of the 10-year review of the Secondary Plan.

TOTAL PROJECT COST ESTIMATE:

The total project cost of the new Rotman Building on Site 11 and related renovations to the existing building is estimated to be approximately \$91,800,000.

FUNDING SOURCES:

The funding for this project has been assembled primarily from external sources including: the Government of Ontario (\$ 50M) as announced in the 2007 Budget and a further \$10M from other grants to the University; Joseph and Sandra Rotman (\$ 2.8M) and U of T (\$ 9M) from general revenues. A further \$20M is intended to be raised through Advancement prior to commencement of the project.

Long-term borrowing may need to be allocated on a contingency basis to accommodate cash flow requirements.

SCHEDULE:

The project is expected to be phased, with renovations to the existing 2nd floor going forward in concert with the new construction on Site 11 to better accommodate the expanding MBA and Master of Finance needs in the earlier phase. Further renovations of the existing building will occur with a second phase after occupancy of the new building, and as further funding becomes available. Assuming approvals to build on the site to the full extent of the program is given without delay, it is expected that the first phase of the project will be complete by the spring of 2011.

RECOMMENDATIONS:

That the Planning and Budget Committee recommend to the Academic Board:

1. THAT the Project Planning Report for the Rotman School of Management Expansion be approved in principle.
2. THAT the project scope of approximately 7400nasm (15,000gsm) new construction and additional renovation of existing facilities be approved with a total project cost of \$91,800,000 to complete Phase One.
3. THAT Phase Two renovations to existing spaces be approved in principle.
4. THAT the preliminary space program for the Executive Development Programs and affiliated research centers be approved in principle for the

provision of approximately 2800nasm (5600gsm) to accommodate these functions.

5. THAT long term borrowing capacity, maximum of \$20 million be allocated, on a contingency basis to accommodate cash flow requirements.

Project Planning Report for the Expansion of the Rotman School of Management

August 22, 2007

Executive Summary

Business education has been offered at the University of Toronto for more than one hundred years, and became formally organized with the establishment of the Faculty of Management in 1971. In 1997, in recognition of a donation from Sandra and Joseph Rotman to support its vision and goals, the School was renamed the Joseph L. Rotman School of Management.

In 1998, following the appointment of Dean Roger Martin, the Rotman School's academic plan for the "Raising Our Sights" cycle (referred to as Plan 2004) outlined a competitive strategy for moving the Rotman School forward to a position of international distinction. The stated goal was to place among the top 20 business schools worldwide by the end of the planning period, and – even more ambitiously - among the top 10 within seven to ten years.

Much has been achieved since then. Strong support from the University, the Rotman Foundation and other donors, has allowed the Rotman School to build on academic strengths over the last seven years to significantly advance all the original objectives.

Building on the School's achievements, the current 'Stepping Up' Academic Plan outlines a range of new programmatic and research initiatives with the objective of moving forward decisively toward an even greater position of international recognition and ranking. The plan focuses on quality improvements, such as significant curriculum redesign, improved student experience, intensified recruiting efforts and improved selection criteria.

At the same time, the plan outlines a staged process of programmatic expansion, in line with the University of Toronto's overall objective of expanding graduate enrolments and research focus. After the 'Stepping Up' plan was completed, it was updated in light of the 'Reaching Higher' graduate expansion plans.

The enrolment expansion plans of the School are fully in line, and indeed have anticipated and pre-dated in part, the University's overall thrust towards graduate expansion. Much of the adjustment should be in place by the University's target date of 2009/2010 and it is expected to be completed fully by 2014.

The further expansion of the Rotman School's programs portfolio, combined with an increase in student numbers in all graduate programs which have been approved by the Vice-President and Provost, will necessitate an additional increase in faculty complement, beyond the target levels envisioned in Plan 2004. The intent is to grow the School's complement to a total of 146.80 FTE's by 2014. That would imply a further complement expansion of about 50% relative to the current faculty size of 97.51 FTE's.

In the new planning phase, the Rotman School will also further expand its broad research activities, organized around a significant number of research centers. Current research activities include the Institute for International Business, the University of Toronto Capital Markets Institute, the Centre for Finance, the Centre for Health Sector Strategy, the AIC Centre for Corporate Social Responsibility, the International Centre for Pension Management, and the Clarkson Centre for Business Ethics and Board Effectiveness. As well, the (reconstituted) Institute for Policy Analysis will find a new home within the University at Rotman. Other centres are planned, among several, in the areas of Leadership, Real Estate and Urban Economics, and Innovation and

Entrepreneurship. These centres will give additional focus and international visibility to the School's research efforts.

The Rotman School of Management currently occupies approximately 5876 (9410gsm) within purpose built facilities located at 105 St. George Street. Since the time of its construction, the School has continued to grow its complement of faculty, students and staff and its programs. Some changes to the original building, including the addition of a 4th and 5th floor to the south wing have helped to accommodate growth somewhat, but are not sufficient to support the current or long-term plans of the school.

Space constraints have imposed severe limitations on student study space, research facilities, administrative services, and the capacity to offer executive non-degree programs. New facilities will allow existing shortcomings to be remedied and planned growth to be accommodated.

A preliminary space program that indicates the space needs of the Rotman School of Management in its envisioned steady state by 2014 was prepared and included in the Interim Project Planning Report approved in December 2006. This space program has been further refined and detailed and is now presented as a final program for the Rotman School on Site 11.

The proposed space program identifies a total of 13,280 nasm of space to be divided between the existing building at 105 St. George Street and a new structure on Site 11 to the south, thus expanding the Rotman complex. With 5876nasm of space existing, and assuming that all of this space may be used fully to accommodate program, a proposed 7406nasm (~15,000gsm) additional space should be constructed to accommodate much of the School's planned growth.

In addition, this report includes a separate (preliminary) space program representing the anticipated space requirements of the Rotman School's Executive Development Programs (EDP). Limitations of Site 11 make it impossible to accommodate this part of the Rotman School space program on that site, and consequently EDP needs were not included in the interim report on Site 11. In this final report, the Executive Development Programs, including some affiliated research initiatives, have been identified as programmatic elements that should stand alone on a separate site within approximately 2800nasm (5600gsm) of space. Currently, the University and the Committee are considering sites on which to locate this program; Site 12 is one of the alternatives being considered.

Space requirements for the Commerce Program, offered jointly by the Rotman School and the Faculty of Arts and Sciences, have been separated entirely from the current project plan and will only be addressed once the current program redesign is completed and issues of the administration of the program are resolved fully. However, it has already been determined that any additional space requirements of the Commerce Program would not be accommodated within the expanded Rotman School complex.

The University of Toronto Area Secondary Plan identifies available sites within the University of Toronto area which are available and have municipal approvals for development. Site 11, one of these sites, is located directly south of the Rotman School of Management building on the east side of St. George Street and is, therefore, well situated to accommodate further Rotman School space.

The site encompasses two existing buildings at 91 and 97 St. George and a surface parking lot. CIUT radio, and the Sexual Education and Peer Counselling Centre (SEC)

occupy 91 St. George Street. Several options exist for CIUT Radio, including relocation to 256 McCaul Street to temporary or permanent accommodation. Space for CIUT is being contemplated in the proposed Student Commons and was identified in the Interim Planning Report for that project. Space for SEC has also been included in the plans for the Student Commons. Both activities will be relocated to space on the campus as secondary effects of this project. Ideally both CIUT and SEC will be located in the proposed Student Commons planned for site 12. In anticipation of this project the Classics Department, occupants of 97 St. George Street will vacate their current space shortly and relocate to the Lillian Massey Building.

The City of Toronto Parking by-law for the University, requires that the St. George Campus maintains 2160 parking spaces. This site currently accommodates 44 surface parking spaces that will be displaced once construction begins. The parking spaces will be relocated across campus, in a variety of locations to maintain the required by-law spaces.

Current design guidelines require retention of the building facades of 91 and 97 St. George Street, while maintaining setbacks from surrounding heritage buildings including the Newman Centre and Church to the south, and Massey College to the east. The development parcel allows construction to a maximum height of 23m (5 stories).

The requirements identified in the space program for the Rotman School exceed the approved envelope capacity of the preferred development site (Site 11). To achieve the full program described in this report, an estimated 10 to 13 stories above grade, a development envelope to an approximate height of 37 to 51m would be required. Site planning consultants were retained in summer 2007 to assist in the review of the site. Preliminary analysis resulted in several options to be considered, but which will require municipal approvals. This site and others on the St. George campus are being examined as part of the 10-year review of the Secondary Plan.

The total projected cost of the new Rotman Building on Site 11 and related renovations to the existing building is \$91,800,000. Funding for this project has been assembled primarily from external sources including: the Government of Ontario (\$ 50 M) other government grants to the University (\$10M); Joseph and Sandra Rotman (\$ 2.8M); U of T general revenues (\$ 9M). It is intended that a further \$20 million will be raised through Advancement prior to commencement of the project.

Long term borrowing may be needed on a contingency basis to accommodate any cash flow requirements.

The project is expected to be phased, with renovations to the existing 2nd floor going forward in concert with the new construction on Site 11 to better accommodate the expanding MBA and Master of Finance needs in the earlier phase. Further renovations of the existing building will occur as a second phase after occupancy of the new building and as further funding becomes available. Assuming approvals to build on the site to the full extent of the program are given without delay, it is expected that the first phase of the project will be complete by the spring of 2011.

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I. Membership

Peter Pauly, Vice-Dean, Research & Academic Resources, Rotman School of Management (Co-Chair)
Mary-Ellen Yeomans, Assistant Dean, Administration & CAO, Rotman School of Management (Co-Chair)
Laurence Booth, Faculty member, Rotman School of Management
Mara Lederman, Faculty member, Rotman School of Management
David Dunne, Faculty member, Rotman School of Management
Bernardo Blum, Faculty member, Rotman School of Management
Uli Menzefricke, Faculty member, Rotman School of Management
Jim Fisher, Vice Dean, MBA Programs and Executive Education, Rotman School of Management
Richard Powers, Assistant Dean & Executive Director, MBA Programs, Rotman School of Management
Suzanne Spragge, Assistant Dean, External Relations and Chief of Staff, Rotman School of Management
Sean Forbes, Chief Librarian, Business Information Centre, Rotman School of Management
Larry Harrison, Director, IT Services, Rotman School of Management
Gabriela Kampouris, Director Building Operations & Services, Rotman School of Management
Christopher Charlesworth, MBA Student, Rotman School of Management
Anton Ovtchinnikov, Ph.D. student, Rotman School of Management
Julian Binks, Capital Projects Planning
Jennifer Adams Pepper, Campus and Facilities Planning, (secretary)

II. Terms of Reference

The project Committee must address the following items:

1. Identify the demand for additional academic space necessitated by enrolment and program growth within the Rotman School of Management.
2. Demonstrate that the proposed space program will be consistent with the Council of Ontario University's space standards. This will require some assessment of all existing and additional accommodations in relation to the total faculty, staff and student complements.
3. Identify all secondary effects, (including site remediation if hazardous materials are present) and including space reallocations within the existing building, impact on the delivery of academic programs during construction and the relocation if necessary, of existing units currently accommodated on Site 11.
4. Consult with the Food Services Ancillary should any change in food services be anticipated.
5. Address campus wide planning directives as set out in the campus master plan, open space plan, urban design criteria, and site conditions that respond to the broader University community.
6. Identify equipment and moveable furnishings necessary to the project and their estimated cost.
7. Identify all data and communication requirements and their related costs.
8. Identify all security, occupational health and safety and accessibility requirements and their related costs.
9. Determine a total project cost estimate for the capital project including all aspects identified above.
10. Identify a funding plan for capital and operating costs.
11. Report by May 19, 2006.

III. Background Information

In September 2002, a Project Committee was established to investigate the space requirements of the Rotman School of Management. From this investigation the most pressing need determined was to address office accommodation for faculty members and instructors related to the expanded activities of the Full and Part-time MBA, Ph.D., Commerce and EMBA/Omnium programs within the School. In response, additional offices were constructed by adding a 4th and 5th floor over the south wing of the building.

The Rotman School of Management continues to maintain impressive academic standing among the very best international schools of management and business. Such progress is tied to the quality of the physical facilities and infrastructure which have been established and available within the Joseph L. Rotman Building. These facilities house the various programs offered by the Rotman School of Management.

This Project Committee is charged with addressing the immediate and longer term, steady state space requirements of the Rotman School of Management consistent with approved academic plans and the future objectives of the School.

Significant work has been accomplished over the past year with participation from the larger committee and its subcommittees set up to report on existing and projected space

requirements of specific areas of the School. Existing space constraints have imposed severe limitations on the student study space, research facilities, administrative services and capacity to offer executive programs. At the same time, the School has been reviewing its long term academic plans and is planning an ambitious programmatic and research-oriented expansion which will include growth to student, faculty, staff and research complements and therefore drive the need for additional space allocations.

A preliminary space program that indicates the space needs of the Rotman School of Management in its envisioned steady state by 2014 was prepared and included in the Interim Project Planning Report approved in December 2006. This space program has been further refined and detailed and is now presented as a final program for the Rotman School within renovated existing space and new space on Site 11. A new integrated building will allow the School to remedy existing shortcomings and will allow for the planned expansion of degree programs and research initiatives.

In addition, this report includes a separate (preliminary) space program representing the space requirements of the Rotman School's Executive Development Programs (EDP). Limitations of Site 11 make it impossible to accommodate this part of the Rotman School space program on that site, and consequently EDP needs were not included in the interim report on Site 11. In this final report, the Executive Development Programs, including some affiliated research initiatives, have been identified as programmatic elements that should stand alone on a separate site. Currently, the University and the Committee are considering sites on which to locate this program; Site 12 is one of the alternatives being considered.

Space requirements for the Commerce Program, offered jointly by the Rotman School and the Faculty of Arts and Sciences, have been separated entirely from the current project plan and will only be addressed once the current program redesign is completed and issues of the administration of the program are resolved fully. Any additional space requirements of the Commerce Program will not be accommodated within the expanded Rotman School complex.

The space requirements identified in the space program for the Rotman School exceed the approved envelope capacity of the preferred development site (Site 11) requiring that additional capacity will be sought for this site. This site and others on the St. George campus are being examined as part of the 10-year review of the Part II Plan.

IV. Statement of Academic Plan

Historical Background

Business education has been offered at the University of Toronto for more than one hundred years, and became formally organized with the establishment of the Faculty of Management in 1971. In 1997, in recognition of a donation from Sandra and Joseph Rotman to support its vision and goals, the School was renamed the Joseph L. Rotman School of Management.

In 1998, following the appointment of Dean Roger Martin, the Rotman School's academic plan for the "Raising Our Sights" cycle (referred to as Plan 2004) outlined a competitive strategy for moving the Rotman School forward to a position of international distinction. The stated goal was to place among the top 20 business schools worldwide by the end of the planning period, and – even more ambitiously - among the top 10 within seven to ten years.

'Raising our Sights' in Retrospect

Plan 2004 identified goals and strategies for the School, and their implications for the growth of faculty complement, graduate and undergraduate program development and delivery, research, and support infrastructure. In essence, the plan involved a significant increase in the scale and scope of all the School's activities.

Much has been achieved since then. Strong support from the University, the Rotman Foundation and other donors, has allowed the Rotman School to build on academic strengths over the last seven years to significantly advance all the original objectives. Some of the most significant achievements thus far have been:

- Implementation of major curriculum reforms in the MBA program structure, focusing on teamwork and cohort principle, the creation of streams of electives, and the strengthening of interpersonal skills. Most important, however, the program has been reshaped by incorporating significant integrative program components as well as innovative courses aimed at fostering students' integrative thinking skills. The Rotman School now offers one of the most innovative programs world-wide.
- Continued improvement to the quality, calibre and diversity of its students while at the same time doubling the size of its MBA Program. The entering class has doubled, while entering MBA GMAT scores have increased to the mid-600 range, placing current students in the 85th percentile (or higher) of GMAT writers worldwide, in direct competition with all but the very best schools.
- Reformatting and launching of a very successful 3-year version of its MBA Program, which is delivered in the evening in the lock-step style of EMBA, with cohorts moving through the program together over a 3 year period
- Reformatting and launching of an innovative one-year EMBA Program, which has reduced the opportunity costs for students from 24 months to 13 months without sacrificing program content.
- Increased scale, scope, and reputation of its PhD program by developing PhD streams in two new areas, doubling the size of the program, and significantly improving the placement of its PhD students at top international business schools
- Rotman has been persistent in its pursuit of incremental curriculum reform in the Commerce program, offered jointly with the Faculty of Arts & Science, and is able to attract top students into the program. Significant improvements in the student experience for Commerce students have been spearheaded by the Rotman School, such as a new Career Services Centre and a new classroom complex at Woodsworth College.
- Outstanding faculty research has reaffirmed the School's reputation as the leading business research centre in Canada. Internationally, the Financial Times consistently ranks the research strength of the School in the top tier. Faculty members continue to receive national and international scholarly recognition. The School has become an attractive destination point for top academics to pursue their research.
- New faculty have been recruited at all ranks – and from leading international schools - in all areas of the School, with more than 60 outstanding new faculty joining our ranks since 1998/99, bringing the total complement to 97 as of 2006/07..

- Information technology has dramatically improved in the School. Since 2002, the Rotman Web Portal serves as the major interface between students and faculty, as well as the School and its alumni base.

In the pursuit of these objectives, Rotman has been helped by great success towards augmenting its resource base:

- There has been dramatic expansion of Executive Education activities, in particular by enlarging a customized program portfolio. Over the six-year period since 1999, executive education revenues have quintupled, and were instrumental in supporting teaching and research advances.
- Permanent endowments have been established for many of its top academic priorities and the School has increased its endowment from under \$20 million to over \$90 million by the end of 2004/2005. The next phase of its development plan is well underway, with an even more ambitious fundraising target of \$200 Million.
- The number of chairs, professorships and endowed research activities in the School has been raised from a total of 9 to a total of 36.
- An innovative new system of financial aid, including an interest-subsidized loan program for all MBA students, attracted highly qualified students in a competitive market.
- Finally, the Rotman School has steadily advanced in the MBA rankings over recent years. The School was ranked #21 in the world in the 2003, 2004, and 2005, and currently ranks in the mid 20's in the Financial Times rankings of the top 100 business schools...

Most significantly these improvements have been achieved under severe space constraints; the current building having been planned to accommodate only about half the student and faculty numbers presently housed in the building. Space constraints have imposed severe limitations on student study space, research facilities, administrative services, and the capacity to offer executive non-degree programs. A new building will allow many of these shortcomings to be remedied.

The Next Phase: 'Stepping Up'

Building on the School's achievements, the current 'Stepping Up' Academic Plan outlines a range of new programmatic and research initiatives with the objective of moving forward decisively toward an even greater position of international recognition and ranking. The plan focuses on quality improvements, such as significant curriculum redesign, improved student experience, intensified recruiting efforts and improved selection criteria.

At the same time, the plan outlines a staged process of programmatic expansion, in line with the University of Toronto's overall objective of expanding graduate enrolments and research focus. After the Stepping Up plan was completed, it was updated in light of the Reaching Higher graduate expansion plans. Over the coming years, between now and 2014, the Rotman School will:

- Further expand the size of its flagship MBA program by three new cohorts (in either the two- or three-year stream), i.e. increase admissions by about 195, and correspondingly student numbers by about 390. The aim is to achieve a

combined entering class of 520 students across six sections of the 2 year stream and 2 sections of the 3 year stream.

- Create new opportunities for specialized flexible entry points into the MBA programs, e.g. professional streams, compressed program for Commerce undergraduates, among others.
- Introduce (effective September 2007) a new Masters of Finance Program with an annual intake of 120 students in the steady state;
- Gradually increase the size of the PhD Program from today's 70 students to about 95.
- Further undergraduate program initiatives will await the upcoming external review of the Commerce Program as well as subsequent consultations between the faculties involved.
- The School will continue its rapid expansion of the Executive Education portfolio. The Executive Development Programs, primarily in the form of customized programs, are essential tools to directly impact the business community. They are also indispensable to assure the financial viability of the School's expansion and generate public visibility.
- There will be expansion of existing research centres and institutes as well as establishment of new areas.

The enrolment expansion plans of the School are fully in line, and indeed have anticipated and pre-dated in part, the University's overall thrust towards graduate expansion. Much of the adjustment should be in place by the University's target date of 2009/2010 and it is expected to be completed fully by 2014.

The further expansion of the Rotman School's programs portfolio, combined with an increase in student numbers in all graduate programs which have been approved by the Vice-President and Provost, will necessitate an additional increase in faculty complement, beyond the target levels envisioned in Plan 2004. The intent is to grow the School's complement to a total of 146.80 FTE's by 2014. That would imply a further complement expansion of about 50% relative to the current faculty size of 97.51 FTE's.

In the new planning phase, the Rotman School will also further expand its broad research activities, organized around a significant number of research centers. Current research activities include the Institute for International Business, the University of Toronto Capital Markets Institute, the Centre for Finance, the Centre for Health Sector Strategy, the AIC Centre for Corporate Social Responsibility, the International Centre for Pension Management, and the Clarkson Centre for Business Ethics and Board Effectiveness. As well, the (reconstituted) Institute for Policy Analysis will find a new home within the University at Rotman. Other centres are planned, among several, in the areas of Leadership, Real Estate and Urban Economics, and Innovation and Entrepreneurship. These centres will give additional focus and international visibility to the School's research efforts.

Of particular note in this regard are two larger centers that are at the core of the School's mission: the Desautels Centre for Integrative Thinking (DCIT) and the (planned) Prosperity Institute (PI). The DCIT is a center of academic excellence in the study and teaching of integrative thinking and is core to the Rotman School's broader mission to

create and promote a new model for business education. The PI is slated to become a globally recognized powerhouse focused on researching the determinants of economic competitiveness and prosperity. The term 'jurisdictional advantage' was coined to describe the work of a geographically defined area (city/state/province/country) to construct an environment that confers on firms located in the jurisdiction competitive advantages over firms located elsewhere. Both centers will achieve global pre-eminence and are important anchors of the Rotman School's reputation.

None of these additional activities can be contemplated in the existing Rotman School building. The School's ambitious programmatic and research-oriented expansion plans are predicated on a new facility to relieve the pressure on the current building and to accommodate program expansion.

The Rotman School: an International Leader in Business Education

The Rotman School is now poised to take the next step towards unambiguous international pre-eminence and distinction. The School's extremely positive trajectory over the last few years has been supported by programmatic innovation and a strong research focus of its faculty. The current academic plan advocates some further program growth, combined with continued research excellence and an expanded executive education portfolio.

The business school market is truly international, and the Rotman School must benchmark itself against the globally leading schools. The international competitive environment remains challenging and the Rotman School faces significant resource challenges. Internationally, the School still stands out in terms of the breadth of its program portfolio, being among only three schools (Rotman, NYU, Texas) offering the full breadth of undergraduate and graduate programs. And it is doing so with a markedly smaller resource base. Yet smart and nimble strategic behaviour will offer great opportunities, such as the ones the School has exploited successfully over the recent years. With its increase in scale during the past seven years, the Rotman School has achieved an efficient scale of operations that positions it well against the international competition. It now must significantly expand its facilities to provide the appropriate environment for vastly increased student numbers, additional programs, increased complement, and significantly broadened research activities.

The Rotman School and Professional Education: Executive Development Programs

Integral to all internationally prominent business schools is a vibrant executive education department that helps engage and inform the broader business community, provides teaching and income earning opportunities to faculty, which in turn aids in faculty recruitment and retention, and generates revenues to fund the research and teaching activities of the school. To that end, the Rotman School's Executive Development Programs (EDP) are pursuing a mission to:

- assist Rotman in its efforts to build connections with the local, national and international business communities and critical public sector institutions;
- develop educational initiatives that can foster research opportunities for faculty and allow for the introduction, testing and dissemination of content that arises from faculty research;
- help build the reputation of the Rotman School by continuing to be ranked in the top-tier of executive education providers internationally;
- make a significant financial contribution to the Rotman School with a target of generating \$25 million in annual revenues by 2010.

The Rotman School's Executive Development Programs has experienced a period of considerable growth and change over the last seven years, a period during which the cash contribution from Executive Development Program activities towards the School's overall educational mandate has significantly improved. Since 1999, executive education revenues have quintupled, and have been instrumental in supporting the Rotman School's overall advances in teaching and research. In 2006, EDP provided executive training to over 30 organizations and nearly 2,700 executives and managers. In keeping with Rotman's commitment to enhancing national competitiveness, EDP has developed strong ties with key community groups in health care, education and policing in addition to its ties with the corporate sector. To fulfill its mission however, EDP must continue to develop its portfolio of innovative business programs while at the same time work to overcome a number of internal and external resource constraints. In particular EDP must overcome the significant impediment that insufficient dedicated classroom and administrative space presents in the fulfillment of EDP's mission and execution of its current and emerging business strategy.

EDP's success so far is due to its current business strategy. EDP's program portfolio mix has moved away from delivering short 2 and 3 day open programs for junior and mid-level managers in favour of 1-week+, customized programs for senior business executives. This change in focus has allowed EDP to develop a niche for higher-end and higher-margin, executive programs which cannot be easily replicated by the competition. The EDP business model has been driven by four key success factors:

- Make it Unique - EDP has developed programs and partnerships which can not be easily replicated by other executive education providers, because of a unique process or product (e.g. Experience Change in Health Care simulation), a unique brand association (e.g. Institute of Corporate Directors), and/or a niche target audience (e.g. Police Leadership Program for aspiring chiefs of police).
- Make it Intense – EDP actively promotes the fact that its programs are intense learning experiences that immerse students in a dynamic, learning community and are designed to make students actively engage with ideas and each other.
- Use Rotman Faculty – EDP draws on the strength of Rotman faculty; roughly 80% of all EDP program sessions are taught by faculty members as compared to some competitors who often use their own faculty for only 20% of all executive education sessions.
- Focus on Custom Partnerships – 90% of all programs offered by EDP in 2006/07 were offered in some form of partnership, customized to the interests of the partner.

EDP's approach was recently validated by Business Week magazine which ranked Rotman's EDP as a top-20 executive education provider in 2005, including a Rotman-best: a 13th place international ranking for custom programs

Going forward, Executive Development Programs will continue to focus on custom programs and will also seek to extend its delivery reach beyond Toronto with the launch of new partnership programs across Canada and a select number of partnership programs in Asia and Latin America. The emerging business model for EDP is based on three strategic approaches:

- Networked Business Approach: EDP will develop a portfolio of unique program offerings which can be delivered through other business schools. This model, piloted with the *Directors Education Program*, will position Rotman EDP as the

generator of Intellectual Property. EDP will be required to oversee the quality of program delivery at different locations and by non-Rotman faculty.

- Consortium Approach: EDP will develop a core community of strong educational partnerships and offer this community a series of unique, intense, customer-focused programs for their mid to senior level executives using faculty who are already familiar with their organizational needs. This effort would be similar to the 'Judy Project' approach where, every year, sponsors send individuals or groups to a common program.
- Global Approach: EDP will weave an international perspective through its programs, staffing and delivery operations and will focus on building a 'global destination' association with the Rotman brand attracting clients nationally and internationally. Given the limited size of the executive education market in Toronto, this approach will be key to EDP's continued growth.

EDP is an important component of the Rotman brand, reaching into untapped market sectors and building relationships within the local and global business communities that are important to the overall success of the School.

V. Space Program

Overview of Existing Space

The Rotman School of Management currently occupies approximately 5876 (9410gsm) within purpose built facilities located at 105 St. George Street. Since the time of its construction, the School has continued to grow its complement of faculty, students and staff and its programs. Some changes to the original building, including the addition of a 4th and 5th floor to the south wing have helped to accommodate growth somewhat, but are not sufficient to support the current or long-term plans of the school. The current inventory is displayed in Appendix 1.

Detailed analysis of the School's current and planned growth identifies additional space needs which will more than double its current space complement. Growth to the academic cohorts and research endeavors within the school will have ripple effects in the number of faculty and administrative staff complements and ultimately to space needs in general. Figure 1 illustrates the existing and planned growth to Faculty, Staff and Student complements.

Figure 1: Existing and Planned Growth Complement Plan

Faculty	Projected 2007 FTE	2005 Approved Plan Targeted FTE	2014 Proposed Total FTE	
Faculty TTS Complement	97.51	130.00	146.80	
Other Academic Staff	4.40	no FTE info included	6.00	
Research Centre Complement	8.00	no FTE info included	19.00	
Administrative Complement	101.30	no FTE info included	139.00	
Business Information Centre	8.00	no FTE info included	10.00	
Executive Education (non-degree)	26.00	no FTE info included	49.00	
	Projected 2007 Enrolment (HC)	2005 Approved Plan Targeted Enrolment (HC)	2014 Proposed Total Enrolment (HC)	
Students				
MBA (2year)	520	650	780	
Advanced Standing Students (2 yr MBA)	n/a	No FTE info included	60	
MBA (3year)	225	390	390	
EMBA	110	55	110	1
Omnium (formerly GEMBA)	80	40	80	2
Master of Finance	30	50	240	
PHD	73	95	95	3

1. 55 per class with overlap of 2 month period only
2. 40 per class with 3 week overlap period only
3. 5 additional visiting PhD students are expected to be accommodated annually

Space Allocation and COU Analysis

Analysis of space allocation based on Council of Ontario Universities (COU) standards suggests that to accommodate the Rotman School of Management in its current configuration would require an additional space allocation of 1218nasm and that with all anticipated growth to 2014 (excluding EDP and affiliated research centres) a maximum additional allocation in the range of 5206nasm would be required. COU analyses are included in Appendix 2.

A space program has been developed using COU standards as the base guideline. The proposed space program requests a total of 13,282 nasm to be divided between the existing building at 105 St. George St, and a new structure to be built on site 11 to the south, thus expanding the Rotman campus. With 5876nasm of space existing, and assuming that all of this space may be used fully to accommodate program, a proposed 7406nasm (~15,00gsm) of additional space should be constructed to accommodate the School's planned growth. Existing, proposed and COU allocations, (excluding EDP and related research initiatives), are summarized in Figure 2:

Figure 2: Space Allocation/COU Allocation Comparison for an Integrated 105 St. George Street and New Site 11 Building

	Space Program 2010 proposed plan (nasm)	COU allocation 2010 proposed plan (nasm)	Existing Space Allocation (nasm)
Faculty Offices	2394	2285	1626
Administrative Offices	1706	1807	1166
Research Space	1255	981	111
Student Space	2339	2520	1132
Classrooms	2518*	1888	1136
Support Space	2619	1023	511
BIC	451	579	192
	13282	11082	5876

* note: includes allocation for 400 seat teaching/event auditorium

The proposed Space Program for and integrated 105 St. George Street and Site 11 New Building follows in Figure 3:

FIGURE 3: Rotman 105 St. George Street and Site 11 Space Program

	total units proposed	nasms per unit	total existing & add nasms proposed	subtotal
SPACE PROGRAM				
Faculty Offices, Area Admin Staff and Area Support Space				
Faculty Offices (TTS/Lecturers Only)				
typical	100.00	12.00	1200.00	
enhanced	49.00	18.00	882.00	
Other Faculty Offices /Shared or Hoteling Offices				
Emeritus offices	2.00	18.00	36.00	
UTM shared faculty offices	5.00	12.00	60.00	
UTSC shared faculty offices	5.00	12.00	60.00	
Adjunct Faculty	6.00	12.00	72.00	
Part-time Instructors	2.00	18.00	36.00	
Executives in Residence	2.00	18.00	36.00	
Acad Area Support Offices	8.00	12.00	96.00	
Academic Area Support Staff Shared Office	1.00	16.00	16.00	
Faculty Area Reception Areas	8.00	4.00	32.00	
Faculty Area Photocopying	8.00	4.00	32.00	
Faculty Areas Lounges/Kitchenettes	8.00	16.00	128.00	
Faculty Area Meeting Rooms (one per area) / seat 8-10	7.00	25.00	180.77	
Faculty Meeting/Seminar Rooms/seat 12	4.00	35.00	137.52	
Faculty Area Coat Closets	2.00	0.60	1.20	
Faculty Area File Storage	2.00	8.00	16.00	
				3021.49
Research Centers Staff and Support Space:				
Prosperity Institute :				
Competitiveness Program (PI)				
Academic Director 's Office	1.00	18.00	18.00	
Managing Director's Office	1.00	16.00	16.00	
Research Associates /Post Doc Offices (shared)	1.00	16	16.00	
Visiting Researchers/Fellows	1.00	12.00	12.00	
Administrative Workstation/Reception Desk	1.00	22.00	22.00	
Reception Waiting Area	1.00	7.00	7.00	
Research Assistants Workroom	2.00	16.00	32.00	

Meeting Room to seat 10/ Library	1.00	25.00	25.00
International Business Program (PI)			
Managing Director's Office	1.00	16.00	16.00
Research Associates /Post Doc Offices (private)	3.00	12.00	36.00
Visiting Researchers/Fellows	2.00	12.00	24.00
Administrative Office	1.00	16.00	16.00
Research Assistants Workroom	1.00	24.00	24.00
Desautels Centre for Integrative Thinking:			
Program in Integrative Thinking (DCIT)			
Managing Director's Office	1.00	16.00	16.00
Research Associates /Post Doc Offices (private)	2.00	12	24.00
Research Associates /Post Doc Offices (shared)	1.00	16	16.00
Visiting Researchers/Fellows	1.00	12.00	12.00
Administrative Workstation/Reception Desk	1.00	22.00	22.00
Reception Waiting Area	1.00	7.00	7.00
Research Assistants Workroom	2.00	16.00	32.00
Board Room to seat 20/Library	1.00	50.00	50.00
Program in Leadership (DCIT)			
Administrative Office	1.00	12.00	12.00
Research Associates	1.00	12.00	12.00
Visiting Researchers	1.00	12.00	12.00
Research Assistants Workroom	1.00	16.00	16.00
Program in Entrepreneurship (DCIT)			
Administrative Office	1.00	12.00	12.00
Research Associates	1.00	12.00	12.00
Visiting Researchers	1.00	12.00	12.00
Research Assistants Workroom	1.00	16.00	16.00
Institute for Policy Analysis (IPA)			
Research Associates /Post Doctoral Offices	4.00	12.00	48.00
Visiting Researchers/Fellows	1.00	12.00	12.00
Administrative Offices	2.00	12.00	24.00
Research Assistants Workroom	1.00	24.00	24.00
IPA Library	1.00	20.00	20.00
Centre for Finance Studies			
Administrative Office	1.00	12.00	12.00
Research Associates	1.00	12.00	12.00
Visiting Researchers	1.00	12.00	12.00
Research Assistants Workrooms	1.00	16.00	16.00
AIC Institute for Corporate Social Responsibility			
Administrative Office	1.00	12.00	12.00
Research Associates	1.00	12.00	12.00
Visiting Researchers	1.00	12.00	12.00
Research Assistants Workrooms	1.00	16.00	16.00
Centre for Real Estate and Urban Economics			
Administrative Office	1.00	12.00	12.00
Research Associates	1.00	12.00	12.00
Visiting Researchers	1.00	12.00	12.00
Research Assistants Workrooms	1.00	16.00	16.00
Area Research Centres (3)			
Research Associates	3.00	12.00	36.00
Visiting Researchers	3.00	12.00	36.00
Research Assistants Workrooms	3.00	16.00	48.00

Research Journal Staff Offices	2.00	12.00	24.00
Financial Research and Trading Lab (total)	1.00	154.16	154.16
Behavioral Research Lab (total)	1.00	125.66	125.66
			1254.82
PhD Program Staff, Student and Support Space			
PhD Student (pre comp) Offices	15.00	12.00	180.00
PhD Student (post comp) Offices	19.00	12.00	228.00
PhD Program Admin Support Staff Shared Offices	1.00	16.00	16.00
PHD Student Lounge	1.00	30.00	30.00
PhD Lounge Kitchenette	1.00	8.00	8.00
Ph.D. Program Photocopying	1.00	4.00	4.00
PHD Student Meeting/Study Rooms (seat 8)	2.00	15.00	30.00
Ph.D. Program File Storage	1.00	8.00	8.00
			504.00
MBA/MFin Programs Staff, Student and Program Support Space			
Program Administration/ Support Space			
MBA /Assistant Dean's Office	1.00	18.00	18.00
MBA Admin Director's Offices	3.00	16.00	48.00
MBA / MFinAdmin Support Staff Private Offices	24.00	12.00	288.00
MBA /MFin Admin Support Staff Shared Offices	9.50	16.00	152.00
MBA/MFin Programs/ Reception Offices for CCC and Progm Service	2.00	20.00	40.00
Masters Programs Admissions Office / Reception	1.00	40.00	40.00
Interview Rooms/Breakout Rooms (6-8 seats) (MBA/EMBA)	10.00	16.00	160.00
Interview Rooms for CCC and Admissions & Recruiting (4 seats)	10.00	8.00	80.00
MBA/Mfin Programs Photocopying	1.00	4.00	4.00
CCC Recruiters Lounge	1.00	20.00	20.00
MBA/MFin Programs Office Records Storage	4.00	varied	53.00
Student Study, Lounge and Activity Space			
MBA Group Study Rooms: 1st year MBA dedicated "offices"	65.00	12.00	780.00
Master's Student Group Study Rooms: bookable; 6- 8 seats	30.00	12.00	360.00
Master's student study space: open carrels		200.00	200.00
Master's Student Study space: open table seating	2.00	82.04	164.08
Master's Student Meeting Room (seat 8-10)	1.00	15.00	15.00
Master's Student Lounge	1.00	150.00	150.00
Master's Student Kitchenette (group study area)	1.00	8.31	8.31
Master's Student Lounge kitchenette	1.00	15.00	15.00
Master's Student Suit lockers (exclgd 1st Year MBA)	460.00	0.14	64.40
Masters Student Laptop lockers	260.00	0.15	39.00
Master's Student clubs & associations	1.00	55.00	55.00
Rotman Enterprise space	1.00	12.00	12.00
			2765.79
EMBA/Omnium Programs Staff, Student and Support Space			
Academic Directors' Offices	1.00	18.00	18.00
Admin Director Offices	1.00	16.00	16.00
Part-time Faculty Office (shared)	1.00	12.00	12.00
Admin Support Staff Private Offices	4.00	12.00	48.00
Admin Support Staff Shared Offices	3.00	16.00	48.00
EMBA Administrative Reception Area	1.00	19.86	19.86
EMBA coat closets	2.00	3.38	6.76
EMBA Business Centre	1.00	13.70	13.70
EMBA Student Centre	1.00	31.71	31.71
EMBA storage	2.00	4.00	8.00
			222.03

Business Information Centre Staff and Support Space

Librarians and Administrative Staff Private Offices	3.00	12.00	36.00
Librarians and Administrative Staff Shared Offices	1.00	28.00	28.00
Libr and Admin Staff Shared Offices/Shared Workspace	1.00	47.00	47.00
Reference desk	1.00	30.00	30.00
Study space/carrel and table seating	1.00	152.00	152.00
Collection/open stacks	1.00	65.00	65.00
Collection/ compact storage	1.00	70.00	70.00
Rotman Research Display area	1.00	10.00	10.00
Copier/scanner	1.00	9.06	9.06
Storage space/coat closets	2.00	2.00	4.00

451.06

Sr Mgmt & Central Admin /Staff Offices and Support Space

Dean's Office	1.00	30.00	30.00
Vice Deans, Associate Deans and Assistant Deans Offices	6.00	18.00	108.00
Senior Admin Director Offices	8.00	16.00	128.00
Private Administrative Offices	14.00	12.00	168.00
Shared Administrative Offices	23.50	16.00	376.00
Building Reception & Security/Staff Workstations	1.00	22.20	22.20
Building Reception and Security Support	1.00	17.10	17.10
IT Help Desk (3 stations)	1.00	30.00	30.00
IT Storage	1.00	28.00	28.00
HR Waiting Area	1.00	4.00	4.00
Central MailRoom/ Business Centre/Staff Workstation	1.00	30.00	30.00
Dean's Conference Room (6-8)	1.00	21.23	21.23
Dean's Office Coat Closet	1.00	0.55	0.55
Dean's Office kitchenette	1.00	2.52	2.52
Deans' Office Shared Photocopying	1.00	4.15	4.15
Deans' Office Area Records and Materials Storage	4.00	8.00	32.00
Advancement Team Storage/Workroom	1.00	30.00	30.00
Advancement Storage (long term)	1.00	20.00	20.00
Marketing/Communications Storage	1.00	15.00	15.00

1066.75

Central Shared Support Space

General Meeting Space/faculty wide (6-8)	4.00	20.00	80.00
Central Photocopying Rooms	2.00	7/10	17.22
Staff Lounge/kitchenette	1.00	40.00	40.00
Kitchens/Food Service:			
Second Cup Coffee Shop	1.00	22.00	22.00
Central Cafeteria Seating	1.00	250.00	250.00
Fully Equipped Cafeteria Kitchen & Served	1.00	100.00	100.00
Fully Equipped Central Catering Kitchen	1.00	75.00	75.00
Central Storage Facilities:			
Building Supplies Storage (Central)	1.00	20.00	20.00
Building Supplies Storage (Local)	5.00	3.00	15.00
Central Furniture Storage	1.00	50.00	50.00
Central Archival Records Storage	1.00	110.00	110.00
MultiMedia/AV/IT support space:			
Media Complex: Multipurpose Media Room and Teaching Effectiveness Centre	1.00	39.00	39.00
Media Complex: A/V Editing Suite	4.00	8.00	32.00
Server Rooms	1.00	35.00	35.00
Audio Visual Storage	1.00	8.00	8.00

893.22

Classrooms & Multipurpose Teaching/Event Space:			
Tiered classrooms (70 seats) / MBA/MFin	7.00	130.00	910.00
Tiered classrooms (40 + seats) / MBA/EMBA/MFin/Ph.D./new	1.00	90.00	90.00
Tiered classrooms (40 + seats) / MBA/EMBA/MFin/Ph.D./existing	6.00	varied	595.48
Breakout Rooms near FlatClassroom (10 seats)	10.00	16.00	160.00
Classroom Support Kitchen (3rd floor)	1.00	18.46	18.46
Classroom Support Servery (3rd floor)	1.00	12.30	12.30
Classroom Support dining (3rd floor)	1.00	67.02	67.02
Multi-Purpose 400 Seat Flat Floor Classroom/Event Space	1.00	665.00	665.00
ATRIUM Teaching/Event Space (250 seats)	1.00	167.80	167.80
Event Classroom (80 tiered seats)	1.00	135.63	135.63
CIBC BoardRoom/Conference Rooms (50 seats)	1.00	78.97	78.97
City of Toronto Event Support Space	1.00	54.94	54.94
New Conference/Board Room	1.00	55.00	55.00
New Event Support Space	1.00	40.00	40.00
Event Space Support Coat Closets	1.00	23.91	23.91
Event Support Storage	1.00	20.00	20.00
			3074.51
Building Maintenance (F&S)			
Custodial Change Room/Office	1.00	8.33	8.33
TOTAL SITE 11 SPACE PROGRAM (NASM)			13282.00
EXISTING NASM (105 St. George Street)			5876.00
TOTAL NEW SPACE PROPOSED			7406.00

Faculty FTE/Faculty Accommodation

Faculty offices are allocated within the plan for each full time FTE faculty member. For the planned academic complement of 146.8FTE and 6.0FTE other Academic Staff, COU would allocate 2285nasm. A total of 2394nasm is allocated within this program and includes spaces for actively involved emeritus professors, UTM and UTSC professors with teaching responsibilities on the St. George Campus, visiting faculty, executives in residence, adjunct and part-time instructors.

Research Space

The Rotman School's December 2005 Academic Plan identified the need to establish the School among the world's leading content providers through leading –edge research and knowledge creation. Over the past five years, we have made significant strides towards our goal to maintain and enhance areas of research excellence, and to push beyond areas of traditional strength and focus to achieve international distinction and visibility in newly identified focus areas. In addition to the achievements of individual researchers, the Rotman School has sought to strengthen its ability to become a locus for leading-edge thinking in several thematic areas through focused research centres. Rotman Centres not only catalyze the research of our own faculty, but also provide important forums for discussion and collaboration between business, government and the academic community as a whole. The 2005 Plan outlines in detail the activity of nine Research Centres/Institutes at the School in varying stages of development, as well as several new initiatives. The development of new research focus areas will necessitate the addition of new faculty to lead, design and champion the research activities, and the creation of the physical space to accommodate these activities. As noted above, Executive Development Programs plays an important role in developing educational initiatives that can foster research opportunities for faculty and allow for the introduction, testing and dissemination of content that arises from faculty research. We have planned

that research centres/activities most synergistic with Executive Education programs be incorporated into the space program being considered for a separate site.

Research space is generated by FTE research staff, faculty and graduate students. For the proposed 2010 Plan, COU would allocate 926nasm of space for this activity (excluding research offices to be located on a separate site with EDP). The program allocates 1254 nasm to accommodate research centres and their staff and support space on Site 11/105 St. George Street and an additional allocation to be paired with the Executive Development Program on a separate site (see EDP program on page 18). Each of the research centres contributes to scholarship and teaching in traditional ways but also engages in significant other ways with the external community.

Included in the allocation are two large Research Centers:

1. The Prosperity Institute , which includes the Competitiveness Program and International Business Program
2. The Desautels Centre for Integrative Thinking, which includes the Program in Integrative Thinking, the Program in Leadership, the Program in Entrepreneurship

The Prosperity Institute and The Desautels Centre for Integrative Thinking are both the focal point of flagship research initiatives of the School (integrative thinking, competitiveness and prosperity). They are also critical to the School's efforts to fund the expansion. Correspondingly, the space plan allocates significant facilities to those two activities, which will be necessary to establish both as internationally leading centers of research.

Four medium sized Research Centres included in the Rotman space program will be located on Site 11: Institute for Policy Analysis, Centre for Finance Studies, AIC Centre for Corporate Social Responsibility, and Centre for Real Estate and Urban Economics.

Three smaller Area Research Centres are included and a small amount of space is provided for research journals and content generation.

In addition, included in the proposed research space are two research/teaching labs: the Financial Research and Trading Laboratory and the Behavioural Research Laboratory.

The Financial Research and Trading Lab is an existing physical space funded by ORDCF, which was designed as a state-of-the-art facility combining some of the most advanced computer hardware with sophisticated financial analysis software and databases. It was created as a teaching space when the full time MBA count was 120FTE. With expansion of the MBA student body, and introduction of a new Masters of Finance Program, some modification to the laboratory is necessary. The mandate of the Lab is multifold:

- To enhance the Rotman School's teaching and training by providing students with access to the global financial community and its resources in a real-time setting.
- To contribute to the integration of theory and practice by delivering hands-on experience to users in order to enhance the global competitiveness of our students and our School.
- To become an innovator in new curriculum development, business initiatives, software development & other activities of value to the Rotman School and business communities.

- To provide a focal point for research and training in a range of financial disciplines, including: investment strategy and portfolio management; financial engineering and risk management; trading; and analysis of the microstructure of markets.

The Behavioural Research Lab was created in 1995 when the Rotman School moved to its current facility. The initial purpose of the lab was to ensure that researchers would have reliable access to space suitable for conducting studies of individual and group behaviour. As the community of researchers at Rotman interested in behavioural issues has grown, the lab has provided a focal point for interaction, investigation and learning. More recently the need for a state-of-the-art laboratory facility has become critical with the advancement of the Integrative Thinking agenda at Rotman.

In addition to the research centres to be accommodated on Site 11, there are four more medium sized research centres and a studio lab being planned as part of the EDP site complex given their close alignment with EDP's educational mission.

The Clarkson Centre (52nasm), founded in 1988, grew from the belief that as the relationship between business and society increases in complexity, the need for organizations to manage social and ethical issues becomes critical. The Centre was an instrumental leader in the development of codes of ethics and codes of conduct for many of Canada's largest corporations, and today centre associates teach business ethics to our MBA, MMPA, Executive MBA, and Omnium program participants, and develop and deliver specially tailored courses, such as Applied Ethics for Financial Professionals through EDP.

The Centre for Health Sector Strategy (52nasm), inaugurated in 2004, drives a research agenda that is aimed at producing actionable management knowledge for the health sector and the life sciences. Executive Development Programs has developed a niche set of programs associated with the health sector, providing the educational mechanism for the dissemination of leading edge research locally and across Canada. The physical presence of the Health Sector Strategy Centre on the same site with EDP will reinforce this synergistic relationship.

The International Centre for Pension Fund Management is striving to become a global catalyst for improving pension management. To this end, the Centre sponsors research and fosters dialogue that focuses on building better pension 'deals', better pension fund organizations, and better pension legislation and regulation. Through these activities, opportunities are being created to raise pensions-related content in regular and executive courses at the School.

The U of T Capital Markets Institute was established in 1998 through a donation from the Toronto Stock Exchange to the University of Toronto and is a joint initiative of the Rotman School of Management and the Faculty of Law. The Institute is leading the effort in determining how capital market mechanisms and institutions should be designed in order to create a superior environment for investors and issuers in a small, open market like Canada. The CMI ensures broad participation by academics, market participants, regulators and legislators in the design, execution and presentation of its research programs through roundtable discussions, informal meetings, presentations of works in progress, articles published in both academic and practitioner journals and joint industry-academic conferences.

The Design Works Innovation Studio (200 nasm) is also planned for location on the Executive Education site. The Rotman School established **designworks™**, a centre for design-based innovation and education in order to promote the principles and practice of design thinking. Part of the Rotman Design Initiative, **designworks™** is a program that fuses the strengths of its academic and industrial partners to provide a working model for inspiring innovation across a wide range of design-related disciplines. A natural fit to EDP's mission, this centre aims to shape corporate culture and groom a new generation of business designers by providing design coaching, innovation workshops and other customized programs.

Administrative Complement and Administrative Support Accommodations

A projected increase in administrative complement is required to support the planned growth of student enrolments and faculty complement as well as to satisfy goals of the Academic Plan to improve program delivery, career services, and other support functions for the School to remain internationally competitive.

The planned complement of 139 FTE non-academic staff (excluding library staff, and also EDP & affiliated research centre staff who will be on a separate site) generates 1807nasm of space according to COU. A total of 1706nasm is included in this space program to accommodate office space for administrative staff.

The proposed space program allocation includes a mix of private and shared offices for all planned administrative staff.

COU generates 1023nasm of space for support activities. A significant increase to this allocation, 2619nasm of space, is included in the space program to capture all the School's needs. These needs include School wide allocations for food services and event spaces that would not typically be included in a COU allocation for support space, but which are crucial to the operations and program requirements of the Rotman School given its significant activities that connect with external communities.

Support spaces include several meeting rooms and larger event and conference type rooms to support the wide range of activities planned within the School.

A multi purpose media production and viewing facility will assist faculty and students with the preparation of presentations, lectures and other material requiring multi-media production. In addition a media relations room will be located in the facility allowing faculty to be interviewed for news programs from the Rotman building and also for teleconferencing and other remote media requirements to be fulfilled.

A cafeteria/dining area with seating that satisfies both the MBA, Master of Finance and EMBA programs' requirements and also the greater Rotman population at large will be included. To service this cafeteria a large kitchen with additional capacity for catering to other areas in the building is included in the program.

Administrative support spaces are also included within distinct areas to include mailrooms, photocopy/fax rooms, storage, reception, IT service, lounges, and other necessary spaces.

Student Spaces

The current complement of graduate students of 998 FTE (708FTE accommodated within week-day offered programs) is expected to increase to 1710FTE (1105FTE accommodated within week-day offered programs). This planned complement of

students would generate 2520nasm of student space to be allocated between offices, and other student activity space. The program allocates 2339nasm of student space. .

Included in this allocation will be carrel space (grouped 3 to an office) to accommodate PhD students, and dedicated group study rooms for 1st year MBA students (one room for each group of 5 students) to accommodate group work, lockers, and to provide a sense of belonging to this group. A number of bookable group study and meeting rooms are also included for upper year Master's and PhD students as well as additional open table seating and carrels to supplement those already at the Rotman School. The program also includes lounge spaces with kitchenettes, and club office space for the graduate student population.

Classroom Spaces

New and reconfigured classroom facilities will be required to accommodate the anticipated growth in student population. For the anticipated student population, COU would allocate 1885nasm of classroom space (see COU analysis and existing classroom analysis in Appendix 2). The space program includes 2518nasm of classroom space to accommodate this function and the many other significant activities at the school.

The total number of classroom spaces across the Rotman campus will include seven large 70-seat tiered classrooms with deep continuous desks and comfortable loose seating. These rooms will be used by the MBA and Master of Finance Programs. As enrolment is targeted at 65 per MBA and Master of Finance class, each classroom has been sized to accommodate a full class plus a maximum of 5 visitors.

Seven 40-seat tiered classrooms will be necessary in the program to accommodate second year elective classes in the MBA and Master of Finance Programs, as well as smaller EMBA and larger Ph.D. classes. Four of the existing classrooms (127,133, 142, 147) will be reconfigured to better accommodate this number of students and two (368, 374) will be re-used in their current configuration. One additional classroom will need to be built in the new facility to complete the seven required.

A large multipurpose 400 seat flat floor auditorium is also included in this allocation. Among other purposes, it will allow the entire 1st year MBA class to gather for lectures, symposia, guest speakers. The room is to be very flexibly designed to allow for reconfiguration and division for a wide range of program curriculum requirements, and will be used heavily as event space when not in use for classes.

When divided, this room will allow for different types of teaching styles that are not properly accommodated in a tiered-seating environment. It is expected that several classes will change format to make use of this space. The room will offer a flexible format with advanced instructional technology and videotaping capability to also fulfill the experimental classroom needs of the School's Teaching Effectiveness Centre.

Although the room will be Rotman space and not Office of Space Management (OSM) space, the space will be made available on occasion for other University uses when not booked for Rotman classes and events. An overview of large classrooms on campus shows that only three other rooms of this size are available by OSM bookings. Fall 2005 data shows that large classrooms are running at 67% of the COU standard and within the core hours of 10:00 to 14:00, these rooms show relatively high utilization (80-90% used). As such, an additional large classroom space such as this would be well used when made available outside of Rotman School needs.

Ten breakout rooms will be situated in close proximity to the auditorium to allow for the use of both types of space simultaneously. An additional 10 breakout rooms will be located within close proximity to both the EMBA classrooms and to the MBA Career Centre, so they may also be used as interview rooms during the heavy recruiting season.

Library Spaces

The Library (BIC) currently occupies 192nasm of space which is a reduction from its original planned space because of subsequent changes to space allocation in the building. The increased cohorts of students generate 578nasm of library space. Included in the program are 451nasm of Library space which will accommodate 2 additional workstations for full time librarian staff, increased study space (carrel and table seating) and a small area for research centre related display.

Room data sheets that describe each room in the space program in detail are included under separate cover in Appendix 7.

EXECUTIVE DEVELOPMENT PROGRAMS

The proposed Preliminary Space Program for Executive Development Programs and affiliated research follows in Figure 4:

Figure 4: EDP and Affiliated Research Preliminary Space Program

Executive Education Programs Space			
Program Administration/Support Space			
Assoc & Asst Deans' Offices	2.00	18.00	36.00
Academic Hoteling Offices	5.00	12.00	60.00
Admin Support Staff Private Offices	19.00	12.00	228.00
Admin Support Staff Shared Offices	16.00	16.00	256.00
Admin Support Workroom /Supplies	1.00	45.00	45.00
Classrooms, Breakout & Multipurpose Teaching/Event Space:			
Tiered classrooms (60 seats)	2.00	108.00	216.00
Flat Floor classroom (45 seats)	2.00	60.00	120.00
Studio Space (60 seats)	1.00	90.00	90.00
Breakout Rooms /Interview Rooms (8 seats)	28.00	18.00	504.00
Student Lounges	2.00	120.00	240.00
Snack/Servery Areas	2.00	10.00	20.00
Classroom Support Offices	2.00	18.00	36.00
Classroom Support Coat Closets	5.00	5.00	25.00
Bus Centre/Bus Info Centre	1.00	30.00	30.00
Boardroom/Video Conference Room	1.00	40.00	40.00
Kitchen/Dining/Catering Support Space			
Catering Kitchen/Catering Staff offices Complex	1.00	83.00	83.00
Dining Facility	1.00	250.00	250.00
Central Admin. Support Space			
Faculty/Staff Lounge	1.00	20.00	20.00
IT Service	1.00	10.00	10.00
Reception /Foyer	1.00	30.00	30.00
Reception Coat Closet	1.00	5.00	5.00
Furniture storage	1.00	30.00	30.00
Records Storage	1.00	8.00	8.00
Research Centre Space			
Health Sector Strategy Research Centre			

	Administrative Office	1.00	12.00	12.00
	Research Associates	1.00	12.00	12.00
	Visiting Researchers	1.00	12.00	12.00
	Research Assistants Workrooms	1.00	16.00	16.00
Clarkson Centre for Business Ethics and Board Effectiveness				
	Administrative Office	1.00	12.00	12.00
	Research Associates	1.00	12.00	12.00
	Visiting Researchers	1.00	12.00	12.00
	Research Assistants Workrooms	1.00	16.00	16.00
International Centre for Pension Management				
	Administrative Office	1.00	12.00	12.00
	Research Associates	1.00	12.00	12.00
	Visiting Researchers	1.00	12.00	12.00
	Research Assistants Workrooms	1.00	16.00	16.00
U of T Capital Markets Institute				
	Administrative Office	1.00	12.00	12.00
	Research Associates	1.00	12.00	12.00
	Visiting Researchers	1.00	12.00	12.00
	Research Assistants Workrooms	1.00	16.00	16.00
Design Works Innovation Studio (including staff)				
		1.00	200.00	200.00
TOTAL Executive Education SPACE PROGRAM & Affiliated Research Activity (NASM)				2790.00

Rankings of Executive Education Programs indicate that the quality of facilities is one of the most important factors in determining repeat business, and those schools that are ranked the highest have excellent facilities. Executive Development Programs requires a facility that will help position Rotman as an international executive education destination of choice. The facility must support EDP's efforts to implement strategies for delivery of more high-margin programs, dramatically improve its ability to draw business from outside the GTA, the province and the country; and capture revenue streams currently being lost to external vendors such as conference centres.

Over the past few years, Executive Development Programs has been challenged to respond to dramatically increased volumes of activity and changes in client preferences with a facility severely limited in size and flexibility, resulting in diminished client experience; suboptimal delivery of the experiential or group work portion of a program; and a diminished ability of faculty to successfully facilitate learning. Many programs have been driven offsite in order to meet client requests for a type of learning that can not or can only rarely be accommodated in our facility. Unlike most other executive education departments that deliver offsite for reasons that are client driven, EDP has moved 25% of its business offsite as a necessary strategy for growth.

Based on an analysis of Executive Development Programs' financial performance over the last 7 years, EDP will need to generate approximately 1400 program days to generate \$25+ million in program revenues with an estimated 80% of this programming to be delivered on-site. To accommodate projected business volumes, EDP will require 4 dedicated classrooms with dedicated breakout rooms and a studio area. Common areas, washrooms, dining rooms, computer stations, etc. have been planned for typical daily volumes (in the steady state) of between 90 and 240 participants, plus between 10 and twenty faculty members and 54 staff members.

In order to grow in its success, EDP must offer clients an educational experience that responds to their needs, and meets brand expectations for both Rotman and the University of Toronto. The facility is of critical importance in meeting these objectives.

EDP will require a facility designed to deliver on the special educational and logistical needs of executive program delivery, to minimize distractions from the learning experience and to facilitate peer learning and informal interactions among faculty and participants. The facility needs to include the following:

- Two tiered classrooms (seat 60 each) with deep continuous desks, loose comfortable seating and adjacent coat rooms and storage space
- Two flat classrooms (seat 45 each) with reconfigurable desks and temporary, movable tiers, loose comfortable seating and adjacent coat rooms and storage space
- Studio space (seat 60) which can be used in conjunction with classroom space for experiential exercises, or as additional classroom space;
- Twenty-eight fully equipped breakout rooms in proximity to classrooms, each with a capacity to seat 10 participants
- Classroom support offices, highly visible and accessible to program participants, which include hoteling offices for academic program directors and workstations for program coordinators and printing facility
- Two participant lounges in close proximity to classrooms, designed to be comfortable, congenial spaces allowing for networking and informal participant interactions, and to include web access terminals or private communication cubicles to support the clients' need to stay connected to their offices during breaks; and including perpetual coffee break stations with hot and cold beverages and healthy snacks available at all times.
- Secure front reception area and foyer as an entry point to the facility, with comfortable seating, marketing material display space, etc, to include reception staff and concierge service and Rotman Enterprise shop to sell Rotman publications and brand items
- A full service business centre including computers, printers, copiers, fax etc
- A full service kitchen (60 nasms) for use by catering staff to supply fresh, healthy food for all meals and breaks; additional office space for catering staff
- A dining facility (250 nasm/110 seats) for program participant meals or use for special functions;
- Reasonably sized offices and work spaces for administrative staff, configured in an efficient way to support teamwork and the sharing of information and resources
- IT Service space to store and house IT equipment (server), telecommunications and security equipment for the facility
- A faculty/staff lunchroom/lounge
- A boardroom/video conferencing room with high quality finishes to be used for client meetings;
- Easily accessible storage space for a large and quickly revolving inventory of office supplies, study and reference materials, branded items etc.;
- Office and support space for 4 research centres and the DesignWorks Innovation Studio Lab, all involved in research activity affiliated with Executive Development Programs

Additional site requirements include:

- Access to parking
- Access to loading dock
- Facility infrastructure (corridor space, washrooms, elevators) to support large numbers of users requiring support at concentrated times (snack/meal breaks, washroom breaks etc) [typical daily volumes of between 90 and 240 participants, plus additional 65 faculty/staff

- Occasional access to a 300 seat auditorium;
- Proximity to Rotman community, preferably on a site that can be considered part of an extended Rotman campus within this precinct of the University campus.

VI. Functional Plan

This project will be completed in two phases. First, renovations to existing 2nd floor space will be undertaken along with the construction of a new integrated building on Site 11. Once this first phase of work is complete, additional renovations will occur within the existing building to complete the full plan for the site, assuming additional funding and approvals are achieved. The following outlines functional plan considerations for the completed 2-phase project.

Site Connections

Preliminary planning of spaces within the existing and new building on Site 11 assumes a seamless connection, at the south end of the existing building, to the new building on all common floors (1-5). To do this, it is anticipated that a glazed connection be built to ensure light is available to both new and existing facilities, and provide a common walkway and communal area between the two, including the potential for bridge connections on upper floors. Integration of the existing and new structures will be completed as part of Phase One.

Rotman Complex Entrance and Atrium

The primary entrance to the expanded Rotman complex will remain in its existing location, however with some modifications to the exterior of the building to provide more effective transition from the streetscape to the building and to address concerns that the outside entrance should create more of a “Rotman MBA” announcement. Additional signage can partly accomplish this, in addition to structural changes to the entrance and entrance foyer to establish the Rotman brand more prominently.

With changes to the front entrance as much exterior space as possible will be captured to support Rotman community use of this area, particularly the students. Plans include relocating an existing coffee shop to an interior site (part of Rm.102) that will open into a front courtyard area with extended canopies, or possibly, a curbside “greenhouse” seating area that will wrap slightly around the northwest side of the building. Glazed walls that slide open to achieve an indoor/outdoor feel in the warmer weather would dramatically transform this area and make it an attractive and comfortable space for community building.

The main reception area in the existing building will remain as the building reception for the expanded Rotman complex. The area behind it will be expanded to serve all anticipated functions, in particular a cluster of offices and other space associated with delivering IT services, including the central HelpDesk and audio visual support to the atrium and classrooms, and general building service operations support, including security operations and the central mailroom. Toward the east end of this space will be a janitorial service area to satisfy not only waste storage and transfer needs, but also to accommodate significant delivery vehicle traffic at the back door entrance.

First floor student group study space will remain in its current location. One existing classroom in this area will serve as a dedicated event classroom (134), and four others will be renovated in their current location (127, 133, 142 and 147). Rooms 157, 151, 159 will be reconfigured to make a conference/boardroom complex similar to the existing CIBC/City of Toronto rooms. The new event complex adjacent to the atrium will

augment the functional flexibility and overall capacity of the atrium area which will continue to function as the main gathering space in the School, servicing a wide range of high profile special events. The atrium infrastructure will be upgraded to enhance functional capability. Careful attention to the design and aesthetics of this space is imperative to preserve its importance as a spatial reflection of the Rotman brand. All work to the entrance and atrium area will be accomplished as part of Phase Two.

Professional Masters Program Space

The second floor of the Rotman complex will provide a welcoming, highly visible, effective and well branded locus for the administration offices providing support to the professional masters programs (2 and 3 year MBA and Master of Finance Programs). The Rotman School has a highly personalized and customized approach to creating an optimum environment for students. To this end, a strong network of program offices are planned to help shape the student experience at all levels. To achieve the amount of space required in the steady state to support these program objectives will require expansion and reconfiguration of space in the existing building. As the plan envisions the entire 2nd floor will be devoted to professional master's program space, the challenge will be to clearly delineate the three main areas of administrative services for Recruiting and Admissions, Program Services and the CCC, while creating an overall seamless presence for the MBA program that emphasizes its status as the flagship program of the School. There should be no doubt that from any vantage point on the first or second floor of the atrium, the importance of this second floor space makes a strong, professional statement worthy of the Rotman MBA brand. The staircase to the second floor should be redesigned to create a more professional and gracious entrance to that space. Renovations to the space at the second floor landing should be constructed to stream visitors to the appropriate reception area where they can be received. While the emphasis will be on the MBA Program, the Masters of Finance Program also needs to have a clear presence within the second floor masters programs complex, especially considering the significant sharing of administrative resources between the MBA and MFIN Programs.

The program administrative offices of the MBA Programs and Master of Finance Program will create a u-shape around the north/east/west sides of the second floor, and to the degree necessary the south side as well. Current space for the Assistant Dean's office will remain as is within this overall space. Each area's functional requirements are as follows:

Recruitment and Admissions

The Recruitment and Admissions reception area will be the first point of contact for anyone visiting the 2 or 3 Year MBA or MFIN programs. As such, the reception area should be large enough to accommodate separate workstations for the 2year MBA, 3 Year MBA and MFIN Program reception staff. A low counter style reception desk with adequate staff space and storage space for brochures, information packages, etc. underneath should front a waiting area for a minimum of 4 guests. Further space should allow standing room for a further 4 people. Chairs and a heavy duty coat rack are needed for this reception area. Access to the elevator should present to the reception area, as well as the main staircase from the first floor of the atrium.

Behind the reception area, a door should lead to an operational room, staff offices and interview rooms. The operational room is intended as a secure file storage area. The room should be large enough to accommodate a "compact shelving system" (similar to the BIC) and shelving to hold approximately 360 boxes of brochures, envelopes and magazines. (The compact shelving system could also provide file storage for Program Services assuming it is in a central location and the room is secure and large enough to

accommodate both departments' needs.) The room should also house a dedicated printer and fax machine and a large table to be used for collating information packages.

A minimum of 4 out of the ten planned shared interview rooms will be required within the Recruiting and Admissions area to accommodate program candidates. (Note: These rooms will fulfill some of the CCC's requirements for access to a minimum of 20 recruiting interview rooms on the second floor, the rest of which will come from the other 6 dedicated interview rooms, and the inventory of 10 breakout rooms shared with EMBA and other bookable group study rooms). Additional shelving, where possible, in the interview rooms, a coat rack and a glass door or windowpane are also required. Additional access to the interview rooms (one allowing interviewees to bypass the reception area) needs to be considered in light of other program requirements.

R & A administrative staff offices should be located in close proximity to the reception area. In addition to the reception area staff, the offices would accommodate the Director, 4 Assistant Directors (1 new FTE), 2 Communications Officers and a Recruitment/Admissions Officer (1 new FTE)

Program Services

Program Services is made up of 3 distinct areas: Student Services, Academic and Registrarial Services, and International Programs and Services. These 3 areas provide integrated service to all three masters programs: 2 and 3 Year MBA and Master of Finance Programs. To support the roles and activities in program services, the staff would require shared or private offices, workstations for work study students, and a general reception/front desk area with sufficient room for 3 staff. Office space should replicate that described above for the Recruitment and Admissions area.

In addition to office space, sufficient space for 1000+ current student files, 1000 recent alumni files and approximately 100 general office files must be factored into the space within the Academic & Registrarial Services area. (Please note that these files may also be part of the "compact shelving system" noted earlier under R&A.) Appropriate table space for storing, preparing and collating course/instructor evaluation packages and grades materials is also required. Some consideration should be given to combining the file storage needs of both PS and R&A.

Corporate Connections Centre

Similar to Program Services, the CCC provides integrated service to all three masters programs: 2 and 3 Year MBA and Master of Finance Programs. CCC staff each require individual offices due to the confidentiality of their meetings with students. The Student Liaison requires receptionist-type space. As noted previously, the office space should be similar to that used in R&A.

To provide a more professional environment for our recruiters and students, a reception (waiting) area with space for a minimum of 12 people is required. The addition of a recruiters lounge, furnished with comfortable seating, kitchenette with sink, small refrigerator, telephone and outside computer lines will provide both relaxation and work space for our many recruiters during breaks in interviews and company presentations.

One of the general meeting rooms (seating 6-8 people) will be located in this area and will be available for general booking with priority given to the whole MBA area.

CCC requires access to a minimum of 20 interview rooms. Ten of these rooms will be small (4 seats and a table) and will be shared with R&A as their needs dictate. Since

four out of these 10 rooms will be located in the R&A area, the possibility of accommodating all of the other 6 interview rooms in one area within the CCC should be considered. The other 10 rooms will be shared as EMBA breakout space so they should be located in space also accessible to this client group. In non-peak times, these rooms can also be utilized as general student study space and group meeting rooms. Other bookable meeting and break out rooms will be used to supplement interview space as needed.

Other shared facilities within the building will be available to support CCC requirements, including the new boardroom/reception room off the atrium to accommodate large recruiting activities. The new media complex will provide the space needed for student/staff project preparation and videoconferencing facility that will assist in overseas recruiting.

Master of Finance Program

This program is in its seminal stages with the first cohort entering in September 2007. Operations supporting the program have been fully integrated with the MBA programs. While the staffing needs of the program have been addressed in both R&A and PS, space for a Director and Program Coordinator needs to be provided in the general vicinity. Signage to identify a clear presence of this program will be challenging within an area that overall will be heavily branded as Rotman MBA.

The BIC and Finance Research and Trading Lab

The Business Information Center (BIC) will be expanded and also shift its focus more towards training and consultation. In order to provide more contiguous and visible space for the professional masters' programs on the second floor, and to accommodate the BIC's new size, the BIC will be relocated to space in the new facility on the second floor. Ideally the BIC will continue to be in proximity to the Finance and Trading Lab. To do so may require the lab to be moved, dependent on the final plans for the MBA space on the second floor.

All 2nd floor existing space will be renovated for MBA Programs as part of Phase One.

Dean's Office and Central Administrative Staff and Support Space

The third floor Deans' Office area will be expanded (offices and support space) to accommodate growth in the senior management and central administrative functional units currently located in this area. The amount of space required would take up more than the entire north and east side of the third floor in the existing building, and thus relocation of certain subunits within the Deans Office (e.g. the CAO's offices) within the new facility will be explored. Overall minor renovations may be required to create larger, more efficient team workrooms for specific functional units that work together and share information and resources, in particular financial services, development, marketing and communications and human resources. Additional space for the Dean's Office and Vice Dean/Associate Dean Offices will require a reallocation of space and some minor renovation.

In general, administrative staff offices will be clustered together by function and should include all required support space within their immediate area. Those administrative functions that require easy access by students and faculty members will require careful planning in order to provide adequate presence in the building, while maintaining a coherent plan. Those functions that require security due to the confidentiality requirements for records management also need careful planning to achieve efficiency in the use of shared workspace. Shared access to records or materials will be an overall concern for administrative staff in this area.

The proposed space program allocation includes many typical support spaces, including reception areas, lounge spaces, storage rooms, business centres, photocopy rooms, and bookable meeting rooms, all of which will be either located within a specific administrative area as noted within the space program, or if a central support space, distributed throughout the facility and located where most appropriate given the function and concentration of users. Archival storage and building furniture and supplies storage will be located in the basement space.

A staff lounge will be located centrally and will be made available to all Rotman administrative staff.

All other existing building renovations, not included on the 2nd floor MBA Program renovation, will be undertaken as part of Phase Two.

EMBA /Omnium Programs

High customer service requirements of the EMBA/Omnium Program require a particular configuration of space that makes it efficient to deliver on these requirements. The third floor EMBA and Omnium Program complex already works well in this regard, although it is not currently large enough to accommodate all of the requirements, including some staff growth. Administrative offices will remain generally where they are, and new offices will come from capturing some of the space along the east corridor. Room 348 (and possibly 346) will be converted into a dedicated EMBA/Omnium student centre. The third floor classrooms and classroom support areas, including kitchen, servery and dining facility, will continue to be used by EMBA/Omnium, but by the time when the Executive Education Centre opens, will become available for shared use by all masters' programs, and for special events. Breakout rooms for these classrooms will be located in very accessible space on the 2nd floor, ideally in the MBA CCC area, where they will be shared as interview rooms during recruiting periods. The exact placement of the CCC area on the second floor should take this alternate use of space into account.

Faculty Offices and Research Centre Space

The fourth and fifth floors of the existing and new facility will accommodate space for faculty and area support staff offices, area support spaces (meeting space, lounges, storage), affiliated research centre space and some Ph.D. student space (post comp offices). Each faculty "Area" will be given a clear and identifiable locus through the clustering of functional space associated with the Area. Research Centre spaces will be associated with Faculty areas and clustered together accordingly. Although sizes vary according to the respective research requirements, there will be a need to provide public access and visibility to all research centre spaces through appropriate signage and location while maintaining adjacencies to their respective faculty areas. Each research center includes a number of research offices, research assistant's workrooms and other support space as necessary.

In order to accommodate all of the faculty and research space, additional levels of the new building will also need to be utilized. The two major research centres (Prosperity Institute and Desautels Centre for Integrative Thinking) will be featured on their own dedicated floors in the new facilities. These two facilities require similar but larger in scale space than the other research centres (administrative offices, research assistant workrooms, meeting space etc). Public access through a comfortable reception area and high visibility through appropriate signage and location/orientation is critically important to reinforce the importance of these two research centres. Another research space, the Behaviour Lab, needs a location underground to be both accessible to undergraduate students during normal building operation times, and situated in a low traffic area with

minimal noise and visual distraction to reduce the risk of disruptions to the research activities. The lab will include a reception area, a large reconfigurable room to support research on group decisions and negotiation, focus group studies and mass testing, and eight small rooms for 1-2 participant studies.

PhD Program Space

Ph.D. student offices will be clustered together in several ways. All pre-comprehensive exam students will be allocated carrels within the Ph.D. Program complex, which will include administrative staff offices, and student support space, including a lounge, kitchenette and meeting rooms for TA consultation and student meetings. Once students complete their comprehensive exams, they will be allocated carrels within their area of concentration on the faculty floors. In both cases, student offices will be created, each containing 3 PhD student carrels. As the Ph.D. post comp student offices will be located on the 4th and 5th floors near faculty, ideally the Ph.D. Program complex should be located on the 3rd floor of the new facility, so that the student support space is reasonably close in proximity to all Ph.D. students who will share the student common space.

MBA Programs and Master of Finance Program Student Space

First year MBA students will be allocated dedicated group study space with 5 students to a space. These rooms will be set up as a group office, and in addition to providing meeting space for group work and study, will provide secure space for the storage of student materials in individual suit-size lockers. These rooms should be located in clusters rather than scattered around the School and may be located near classroom clusters where possible. Similar dedicated spaces are offered at peer institutions and considered vitally important to the student experience in the first year of the program.

Additional bookable study rooms (5 seats) and expanded carrel and table seating will be available for priority use by 2nd year MBA students, and students in the Master of Finance Program, 3 year MBA Program, and EMBA/Omnium Program. This type of space is needed to accommodate the wide range of group work that is done by students in these programs. No specific adjacencies are required of these rooms, although they should be conveniently located for student use, and be clustered near other student space, not isolated.

In addition to group study and office space, masters' students have been allocated space for lockers, a lounge/kitchen, clubs space and meeting space, all of which should be conveniently accessible by students 24/7. The meeting space is allocated to allow for student meetings, TA consultation etc. These master's student spaces may be located in existing and/or new space, but must be clustered together within easily accessible locations. The student lounge should be situated centrally to all other student facilities.

Classroom and Breakout Space

Classrooms should be located in clusters, and may be located below ground within the new building provided they are well designed, adequately accessible, and natural light is provided through skylights. First and second year classrooms should be not separated purposely from one another, as it is important that students from the various programs and in different cohorts mix as much as possible. Four existing classrooms (368, 374, 127, 133, 142 and 147) will be used to accommodate six of the seven 40 seat classrooms required for second year elective courses and the EMBA Program. Rooms 127, 133, 142 and 147 will require renovation and re-tiering to accommodate loose seating at continuous desks. Technology in existing classrooms will be reviewed and updated where necessary.

The 400 seat auditorium should be prominently located within the new building on the ground or lower level as it will be used for high profile classes and special events that currently take place in the atrium. If located below grade, gracious stairs and easily accessible elevators must be included adjacent to the auditorium lobby, which will double as event space. In addition, 10 break-out rooms will be located within close proximity to this large room for use in certain teaching methodologies.

IT Services and Media Production Support

Some IT and A/V support space will be located into the lower levels of the new facility. A multipurpose media complex will be located in the vicinity of the IT/AV support space. Included in the complex will be a multipurpose media production facility/teaching effectiveness centre to allow for better use of media and technology in teaching, research and student work. This facility will provide a more suitable space for remote management of classroom a/v equipment, including video conferencing capability. It will also double as a media relations room, supporting faculty interviews at the school, as well as enabling individual faculty broadcast capability. The media complex also includes bookable A/V editing suites for the production, preparation and review of a/v materials by faculty and students,

Event Space

There is very little space in the program that has been planned exclusively for the use or support of special events. Multipurpose space has been planned that can achieve a high degree of utilization through other uses when it is not being used for special events, but in such a way as to not compromise the functionality required for the range of purposes that will take place in the space. Within the space program there are now enough of the shapes and sizes of these types of spaces to meet the wide range of special event requirements. The functional plan has been attentive to the logistics of these multipurpose spaces to ensure there is high visibility, ease of accessibility and a logical placement relative to adjacent areas. The interior furnishings and equipment specified for these spaces will ensure flexibility of use including the wide range of types of events held in these spaces. The multipurpose rooms specifically planned to accommodate special events are: the upgraded Atrium area (250 seats) including the new Conference Room (50 seats) /Reception room that will be created out of rooms 151 and 157 in the Phase 3 renovation; Classroom 134 (80 seats) which already exists and is very much in demand as the event classroom; the new large auditorium (in various configurations ranging in size for conference style seating or dining events up to 400 seats) and surrounding foyer/breakout room space; the existing CIBC Room/City of Toronto Room (50 seats) ; the new cafeteria which will include a bar; and the new greenhouse area at the front of the building (also a Phase 3 renovation). Also planned are some event support spaces, including a coat room and furniture storage space.

Central Kitchen and Dining Facilities

A centrally located cafeteria seating approximately 100-120 comfortably and a full service kitchen will be located within the new building on a prominent floor with an adjacent fully equipped catering kitchen that will service the entire Rotman complex. This food service complex is a very necessary programmatic space to provide convenient, nutritious dining, but also as a central place to build community through casual meetings, study and relaxation. Program food service requirements need to be delivered through this cafeteria complex, with a maximum of 290 program participants seeking food service at any one meal time during the week. The catering kitchen will fulfill catering needs through the building, in particular for special events and program requirements.

Executive Development Programs and Affiliated Research Centres

There are specific functional needs to cluster together classroom and classroom support space for Executive Development Programs, however only preliminary planning has begun on this front. The functional requirements of Executive Development Programs and affiliated research centers that will be located on the separate site will be addressed in a subsequent and final report on that space program.

VII. Environmental Impact

Better environmental designs can significantly reduce operating costs over the life of the building; conversely, a poor design can add considerably to not only operating costs but also can provide a less than comfortable working environment for its users.

Under the Universities *Environmental Protection Policy* and the revised *Design Standards Manual*, and with a commitment to LEED principles and guidelines, including aspiration towards a carbon neutral building, this project can serve as a positive example for sustainable building on campus. The project should strive for a minimum of LEED Certified status for all new construction.

The design team should pay particular attention to:

- building orientation, form and envelope to maximize the use of natural energy or passive strategies such as the use and control of sunlight, ventilating air movements, and diurnal and seasonal temperatures,
- minimize energy use for heating, cooling and lighting through the careful design of the building envelope, mechanical and electrical systems, and the use of low energy fixtures in combination with natural daylight and task lighting wherever possible,
- water conservation through the use of water saving fixtures and close-looped equipment cooling systems,
- metering of energy and water use in the building, or parts of it,
- building materials (e.g. drywall) , finishes (e.g. paint), furnishings (e.g. carpets), fixtures (e.g. lighting) and furniture which are not only emission-free (to provide building occupants with highest quality of indoor environment) but are also the most environmentally friendly in their manufacture and installation,
- provision of recycling depots for source-separation of waste throughout the building to meet the needs of the University's recycling and waste reduction programs and vehicular access to these sites.
- conveniently and sufficiently locating waste receptacles to minimize litter buildup
- provision of appropriate food waste receptacles to contain the food service related garbage in particular given the new central cafeteria and kitchens, as well as local area kitchens in the space program
- creating a sufficiently large central area for the consolidation of and access to recycled materials and waste,
- ensuring that all kitchen facilities in the building have the proper exterior venting for heat and smoke
- directing rainwater (roof) runoff from the City's storm water system and other sources of 'gray' water to satisfy landscaping needs,
- using water penetrable systems in outdoor areas where hard landscaping is required to minimize flows to the City's storm water system (or into the building), and choosing paving materials to assist the University in minimizing the amount of salt used in snow and ice clearance,

- the design and structural reinforcement of roofs and access to them to permit future use as campus open green space by building users, where practical,
- the landscape design to promote local plant species that require low maintenance
- the design of outdoor spaces for all-season use, with shade and cool air movement for the summer, and sun-trapping and wind shelter for winter use, and sensitive accommodation of smokers away from the building entrances to reduce potential harm from second hand smoke.

The Committee recognizes that all of the above strategies may not be practical to implement. However, the design team and the building's users must make an earnest effort to ensure that this building, when viewed in its entirety, will satisfy the environmental goals set out by the University. The Universities Environmental Guidelines and Checklist are included as Appendix 5.

VIII. Special Considerations

Accessibility, Access and Security

The University of Toronto is committed to ensure that its buildings and services are accessible to persons with disabilities. The University's Barrier Free Design Standards can be found at:

http://www.fs.utoronto.ca/userfiles/page_attachments/library/10/8156_1161423_accessibility_8156_1560105.pdf

It is the intention of the University that, in new construction, these standards be implemented in full, that all requirements indicated as "should be met" will be understood as "shall be met". While this is also the University's intention for renovations to existing buildings, where a requirement indicated as "should be met" is impossible to meet given the constraints of the existing conditions, comparable alternative arrangements are to be explored.

The project's Total Project Cost (TPC) estimate includes a line item for a Universal Design Consultant. This consultant is intended to be brought into the design process in a timely manner that will easily permit the incorporation of the consultant's recommendations into the built project at its conceptual stages.

The diverse nature of activities at the Rotman School requires a design of the building that is sensitive to the needs of each specific user, to ensure appropriate levels of accessibility, but also security of specific interior areas, and the building as a whole. This building will be operational throughout the week, 24 hours a day. The building design must allow its users and visitors' access as required and as allowed, safely and easily. At the same time, the design must be sensitive to the needs of the users whose activities require security after hours, and thus require restricted access to certain building users, and to the general public. A detailed security plan will need to be developed for each room, zone or floor, and factored into the design of the building to ensure functionality, accessibility and security objectives are all met simultaneously.

Computing and Communications

The Rotman School is progressive in the use of computer technology and has invested considerable resources to maintain up-to-date IT facilities. A variety of systems and resources support a seamless student experience, the scholarly success of faculty, and

effective functionality of administrative staff. The School has one of the largest wired and wireless networks on campus. Students extensively use wireless laptops to access a variety of web applications and resources such as email and the learning management portal, which have become essential tools of their learning experience both in the classroom and outside.

The general office/workstation computing requirement for this project will include one data outlet (wired) per computer workstation with a 4 port managed switched network jack to accommodate a range of network ready devices. Identified locations of printers will also require a separate data outlet.

One duplex receptacle is required on each wall (2 per office). Open workstation areas and reception areas will require 2+ duplex outlets per wall. Printer, fax machines and photocopiers will require a duplex receptacle. Sufficient duplex receptacles will be required in all areas where students congregate (laptop usage) where there is temporary or fixed seating, i.e. classrooms, corridor areas, lounges, new cafeteria, coffee shop, student meeting and study space, etc.

All data wiring must be to University wiring standards at the time of construction. Currently the standard is Cat5e or higher.

The School currently has the largest wireless network on campus and students, faculty and staff can connect to it anywhere in the building. The wireless network will be expanded to the new facility and wireless coverage will be required in all spaces throughout the entire facility and scaled to support the steady state number of students, faculty and staff that will occupy the building in the future. .

Telecommunication requirements for this project (based on current technology) should consist of one telephone jack and one phone line FTE (41) per office or workstation and one per fax machine. However provisions for new telecommunication technology and cabling such as voice over IP need to be considered at the time of construction.

The existing server room will remain where it is, and a supplementary server room will be expanded into Room 117B as required. The detailed specifications for this space are described in the room data sheets. Conduit connections from the server room to interconnecting communication closets for network/telephone cabling need to be provided as required.

In the new building **communication closets** should be located at a minimum every 2 floors, above one another, with sufficient vertical riser conduit to connect the closets together for copper and fiber cabling as required. For larger or higher density floors, 2 closets per floor would be required (similar to what is housed in the existing building on the 2nd floor). Multiple closets per floor require cross connected conduits between them (horizontally) with fiber and copper cabling as required. All closets need to be cross connected (vertically and horizontally) to the existing building communication closets via conduit with fiber and copper cabling as required. All network/phone cabling needs to be terminated on appropriate mounting boards, termination blocks and fixed racks. The layout of the closets requires sufficient space for the required number of fixed mounted rack(s) for network switches and also working space in front and behind the equipment. Multiple electrical circuits are required to be directly wired to, and outlets distributed on all racks. The space needs to have proper A/C sized to handle the equipment loads in the room and will require additional backup A/C other than building A/C. Effective air

handling , dust control and sufficient lighting for working in and around all of the equipment/racks is required in these rooms.

Current communications closets are approximately 3X3 metres in size and are sufficient for low density cabling closets (similar to the existing 4th floor closet) but for higher cable density locations, a 4X4 metre room would be required.

Campus Planning

The University of Toronto Area Secondary Plan identifies available sites within the University of Toronto area which are available and have municipal approvals for development. This plan goes beyond the approved building envelope. Site 11, is located directly south of the Rotman School of Management building on the east side of St. George Street and is, therefore, well situated to accommodate further Rotman School space. The site encompasses two existing buildings at 91 and 97 St. George and a surface parking lot.

The current design guidelines require retention of the building facades of 91 and 97 St. George, a service/pedestrian laneway and setbacks from surrounding heritage buildings including the Newman Centre and Church to the south, and Massey College to the east. The development parcel holds as-of-right permission to build to a maximum height of 23m (~5 stories). To achieve the full program described in this report, between 10 and 13 stories above grade, or an approximate maximum height of 37 to 51m (assuming ground and top floors of 5m and all intermediary floors at 4.2m floor to floor and two additional levels below grade) would be required.

Since the time that the Secondary Plan was implemented in 1997, intensification of development, in the adjacent neighbourhoods has occurred. In addition, many of the University of Toronto development sites have been built on and few prime sites, such as Site 11, remain. The University is now reviewing the remaining development sites to maximize their development potential within the current climate of intensification and also looking for new sites for development opportunities for the campus.

Any building on Site 11 will require a sensitive approach to the numerous important and historically significant structures surrounding it. The Newman Centre to the south provides a good example of the red brick and terracotta residential structures that once were predominant on the length of St. George Street between College Street and Bloor Street. Massey College, important in its own right architecturally, sits low and quietly to the east of the site. In addition, the new building should respond to the existing Rotman School building and form a dialogue with it that demonstrates a cohesive Management complex architecture.

Servicing of the new structure will occur from the existing rear lane and will need to be carefully planned with respect to pedestrian passage and surrounding building conditions as well as ease of access within the working building. The back of the building should however present aesthetically well on the pedestrian walkway and should be sensitive to the pedestrian traffic that will flow between other Rotman sites in the precinct.

Site 12, 100 Devonshire Place, is being considered as a possible site for a proposed Student Commons, the proposed Varsity Centre for High Performance in Sport and may also include the Rotman Executive Development Programs and affiliated research centres. Site 12 is located south of the historic Administration building at 315 Bloor Street West and holds as-of-right permission within a building envelope that has a maximum height of 28m, along with specific setbacks and landscape requirements. The

Bloor Corridor Visioning Study, a City – Community planning initiative, has recognized greater development potential in this zone of Bloor Street. See Appendix 3 for guideline documents for both Site 11 and 12.

The Committee and the University are reviewing the possibility of locating Rotman Executive Development Programs and the affiliated research centres in this location. To do so, the historic Administration building would require renovations to provide a Bloor Street address for the Rotman function. A new structure on Site 12 would accommodate a combination of University facilities, including, in this scenario, Rotman Executive Development Programs on the upper levels accessed by elevator from the rear of the historic building to provide a seamless connection to the facilities.

Planning consultants have been retained to assist in determining development options for the site. Review of the sites by the consultants and the University has determined that additional height and density should be possible on both sites, but that municipal approvals are required.

IX. Resource Implications

Operating Costs

2006 Operating Costs for the Rotman School of Management building at 105 St. George Street have been calculated at \$210.17/nasm. It can be assumed that this cost, plus that of any yearly increases would apply to all new and existing spaces occupied by the Rotman School. Assuming the proposed Site 11 space program is implemented (7514nasm/15,028gsm) bringing the total Rotman campus area to 13,282nasm, a total operating cost (in 2006 dollars) for the expanded Rotman complex (not including the space program being considered for site 12) would be approximately \$2,791,478 per year.

Moving and Staging

Construction should be phased in such a way to allow generally for the new structure to be completed and occupied before major renovations of the existing building occur, with one exception. The second floor of the existing building needs to be renovated within the next two years to accommodate the growing MBA program, and the design for that space should proceed quickly such that renovation could occur over the 2009 summer period. The general strategy would be to minimize disruption to the ongoing workings of the School. However, some temporary relocation of faculty, staff, students and student related space will be necessary during the first renovation (MBA space), and potentially as a result of the integration of the two buildings through a common connection point. The Phase Two renovation, which accomplishes all other renovations to the existing Rotman building, will be delayed until such time as funding becomes available.

Secondary Effects

The site encompasses two existing buildings at 91 and 97 St. George and a surface parking lot. 91 St. George currently accommodates CIUT Radio within approximately 345nasm. An additional 46nasm is allocated within this building to the Sexual Education and Peer Counseling Centre (SEC) for a total building area of 390nasm. Several options exist for CIUT Radio, including relocation to 256 McCaul Street to temporary or permanent accommodation. Space for CIUT is also being contemplated in the proposed Student Commons and was identified in the Interim Planning Report. Space for SEC has been included in the plans for the Student Commons. Both activities will be relocated to other space on campus as secondary effects of this project. Ideally, both CIUT and SEC will be located in the proposed Student Commons, planned for site 12.

97 St. George Street currently accommodates the Department of Classics in approximately 530 nasm. In anticipation of this project, the occupants of 97 St. George will relocate to the Lillian Massey Building shortly. However, staff space for Rotman Executive Development Programs will temporarily take up space in this building, effective fall 2007 and will require relocation before construction on Site 11 begins.

The City of Toronto Parking by-law for the University, requires that the St. George Campus maintains 2160 parking spaces. This site currently accommodates 44 surface parking spaces that will be displaced once construction begins. The parking spaces will be relocated across campus, in a variety of locations to maintain the required by-law spaces.

Total Project Cost Estimate

The building is conceived as having a similar level of architectural cladding, finishes, and articulation as the present Rotman building, without necessarily mimicking them.

The assumption made with respect to escalation is that the project would be tendered in two phases, with renovations to the 2nd floor of the existing building and new construction on Site 11 tendered in February 2009; and renovation to the remaining existing building tendered in February 2011 or later if funding is not available at that time. An allowance of 7% pa should be made for a tender past that point.

The new building is assumed to have an area of 15,000 Gross Sq Meters, with two levels below grade and approximately nine or more stories above.

The lane would be relocated to the South to a point immediately north of 91 St George to connect to the existing N-S lane. A new curb cut would be required, modifications to the landscaping, and relocation of a fire hydrant. This would allow the direct connection of the new building to the existing building on the south end beyond the parking ramp, although some alterations would be required to make this attractive and useable. The new building would bridge over the lane and connect to a new wing built on the site of 91 St George, while retaining its façade.

The program implies a certain amount of reorganization of functions within the existing building, particularly on the ground and second levels.

There is an allowance in the estimate to address heritage considerations of the two historically designated houses into the new facilities. There are also allowances for site services.

There is an allowance for “green” initiatives and enhancements that is expected to cover LEED Certification for the new building.

Lastly there is an allowance for the relocation of the existing occupants of 91 St George. CIUT and Sex Ed Centre are located on the site. Detailed discussions with these units will determine relocation plans that will be submitted for approval. The total project cost identified in this report provides an allowance to relocate the current activities into other renovated space on the campus.

The Capital Cost estimate for Phase One of this project of \$91,800,000 and Phase Two of \$4.4M is provided in full in Appendix 4.

X. Funding Sources

The total projected cost of Phase One for a new Rotman Building on Site 11 and related renovations to the existing building is \$91,800,000 assuming stipulated tender dates are met. The funding for this project will be assembled primarily from external sources as follows:

Government of Ontario	\$50 M
Other government grants	\$10 M
Joseph and Sandra Rotman	\$ 2.8 M
U of T general revenue	\$ 9 M
Advancement	\$20 M
Total	\$91.8M

Phase two is estimated to cost \$4.4M and will be completed when funding is identified and approvals granted.

Long term borrowing may need to be allocated on a contingency basis to accommodate cash flow requirements.

Cash flow analysis is provided in Appendix 8. Interest charges are included as part of the overall project budget.

XI. Schedule

Assuming a timely schedule for site approvals to accommodate the full program, the expected project implementation will be as follows:

- September 2007 Governance Approval to hire consultants
- July 2007-Nov. 2008 site planning and design phase
- Rezoning following design phase
- Construction assumes 2 stages:
 - i. MBA 2nd floor renovation AND New building construction tender Feb. 2009; complete Jan. 2011
 - ii. Renovation of existing building, assuming funds available: tender Feb. 2011; complete Nov. 2011

The committee has expressed an interest in a two-step architect selection process that would involve short-listing to 3-4 teams to provide concept drawings and models after which one architect/team will be selected to complete the project.

XII. Recommendations

THAT the Project Planning Report for the Rotman School of Management Expansion be approved.

1. THAT the Project Planning Report for the Rotman School of Management Expansion be approved in principle.
2. THAT the project scope of approximately 7400nasm (15,000gsm) new construction and additional renovation of existing facilities be approved with a total project cost of \$91,800,000 to complete Phase One.

3. THAT Phase Two renovations to existing spaces be approved in principle.
4. THAT the preliminary space program for the Executive Development Programs and affiliated research centers be approved in principle for the provision of approximately 2800nasm (5600gsm) to accommodate these functions.
5. THAT long term borrowing capacity, maximum of \$20 million be allocated, on a contingency basis to accommodate cash flow requirements.

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Appendix 1. Space Inventory

105 St. George Street Space Inventory as of October 2006

Department	Category	NASM	total NASM
Ancillary Serv	Food Facilities	4.23	7.43
Bldgs & Grounds	Plant Maintenance	8.33	8.33
Executive Development	Classroom Service	1.71	4.66
	Dept Supp Staff	13.63	124.26
	Faculty Offices	19.17	19.17
	Food Facilities	33.51	48.89
	Non-Tiered Class	9.61	42.28
	Office Support	6.85	6.85
	Tiered Classroom	53.45	106.10
	subtotal Executive Development		352.21
Executive MBA	Classroom Service	1.71	4.66
	Dept Supp Staff	11.60	92.51
	Faculty Offices	24.80	24.80
	Food Facilities	33.51	48.89
	Non-Tiered Class	9.61	42.28
	Office Support	5.95	15.03
	Tiered Classroom	53.45	106.10
	subtotal EMBA		334.27
Management	Bookstore/Merch	4.36	4.36
	Classroom Service	8.21	82.34
	Dept Support Staff	20.62	949.59
	Faculty Offices	20.38	1,534.78
	Food Facilities	1.91	1.91
	General Lounge	56.22	298.62
	Grad Student Off	22.90	187.59
	Library Col Space	71.64	71.64
	Library Support	40.73	121.33
	Non-Tiered Class	16.88	33.76
	Office Support	0.78	369.54
	Other Academic Appt	14.65	47.66
	Res Lab Support	6.53	6.53
	Research Lab	71.08	104.62
	Scheduled Class Lab	71.08	71.08
	Std Off/Supp	5.37	53.46
	Study Space	13.51	592.34
	Tiered Classroom	135.63	643.26
	subtotal Management		5,174.41
	TOTAL Existing Building		5,876.65

Appendix 2. Utilization Analyses (COU, Classroom)

Rotman School of Management GENERATED SPACE BY CATEGORY Current Status

INPUT MEASURES	Existing Complement (as of Sept 07)	Planned for 2010	notes:
FTE U/G Students	0	0	
FTE Grad Students	708.0	1,110	1
Total FTE Students	708.0	1,110	
FTE Academic	101.9	152.8	
Research Centre Staff	8.0	21	2
FTE Dept. Non-Academic requiring offices	101.3	139.0	3
FTE Library Staff	8.0	10.0	
Executive Education (non-degree)	26	49	
COU SPACE FORMULA CALCULATION			
Space Category		Generated Nasm	
Classrooms	871	1,818	4
Instructional Labs			
Group Z	70	70	5
Graduate and Faculty Research Labs			
Group E	456	708	
Academic Dept Office Facilities			
Academic Faculty Offices	1523	2,285	
Research Lab Offices	104	273	
Graduate Student Offices			
MBA	1040	1,680	
EMBA	220	220	
PhD	292	380	
MFIN	120	240	
Academic Office Service	710	1,023	
Non-Academic Staff Offices	1317	1,807	
Executive Education (non degree) Staff Offices	342	637	
Executive Education office service	85	159	
Library stacks	180	280	
Library study space	117	183	6
Library support	74	116	
TOTAL COU ALLOCATION	7522	11,878	
less existing space	5876	5,876	
Less EDP space to be located on alt site	427	796	
Total new COU allocation (NASM)	1218	5206	7
at 2.0 net to gross	2436	10412	7

- notes excludes GEMBA, 3-year MBA, two cohorts of MFIN and one cohort of EMBA as taught outside typical
- : 1 hours
 - 2 full time research staff w/ full office does not include visitors
 - 3 excludes research centre staff, library staff and exec education non degree admin staff
 - 4 see summary data for calculation

- 5 finance lab -50% attributable to instruction
- 6 assumes 33% attributable to home location for these purposes
excludes space allocation for Executive Education (non degree) and research spaces
- 7 which will be located on an alternate site

Summary Data:

COU formula revisions for classrooms to match Rotman program delivery				
	FTE	nasm generated	multiplier	assumption
2yr MBA	840	1512	1.8	2sm per station; 20hr/wk
3 yr MBA	0	0	1.45	2sm per station; 16 hr/wk
MOF	120	174	1.45	2sm per station; 16 hr/wk
COU total		1818		

note: assumes 3year MBA, 2 sections of MOF and 1 section of EMBA taught outside M-F 9-5pm

note: MBA & MFIN student office space allocation adjusted to 2nasm per student to reflect the type of office space required of these students (similar to Law, OISE students taking classes rather than undertaking individual research).

Student HC	M-F days	evenings/weekends	student space allocation (nasm)
2year MBA	840		1680
3 year MBA		390	
MFIN	120	120	240
PHD	95		380
EMBA	55	55	220
GEMBA		40	
TOTAL	1110	605	
		total	1715

COU summary allocations

Faculty	2,285
Researchers	981
Staff	1,807
Classrooms	1,888
Support	1,023
Student	2,520
Library	579
subtotal	11,082
EDP	796
total	11,878

Room Utilization Rate: Based on COU standards

Hrs: Mon-Thur. 9a.m. to 9 p.m. and Friday 9 a.m. to 6 p.m => 100% = 741 hrs

No maintenance included.

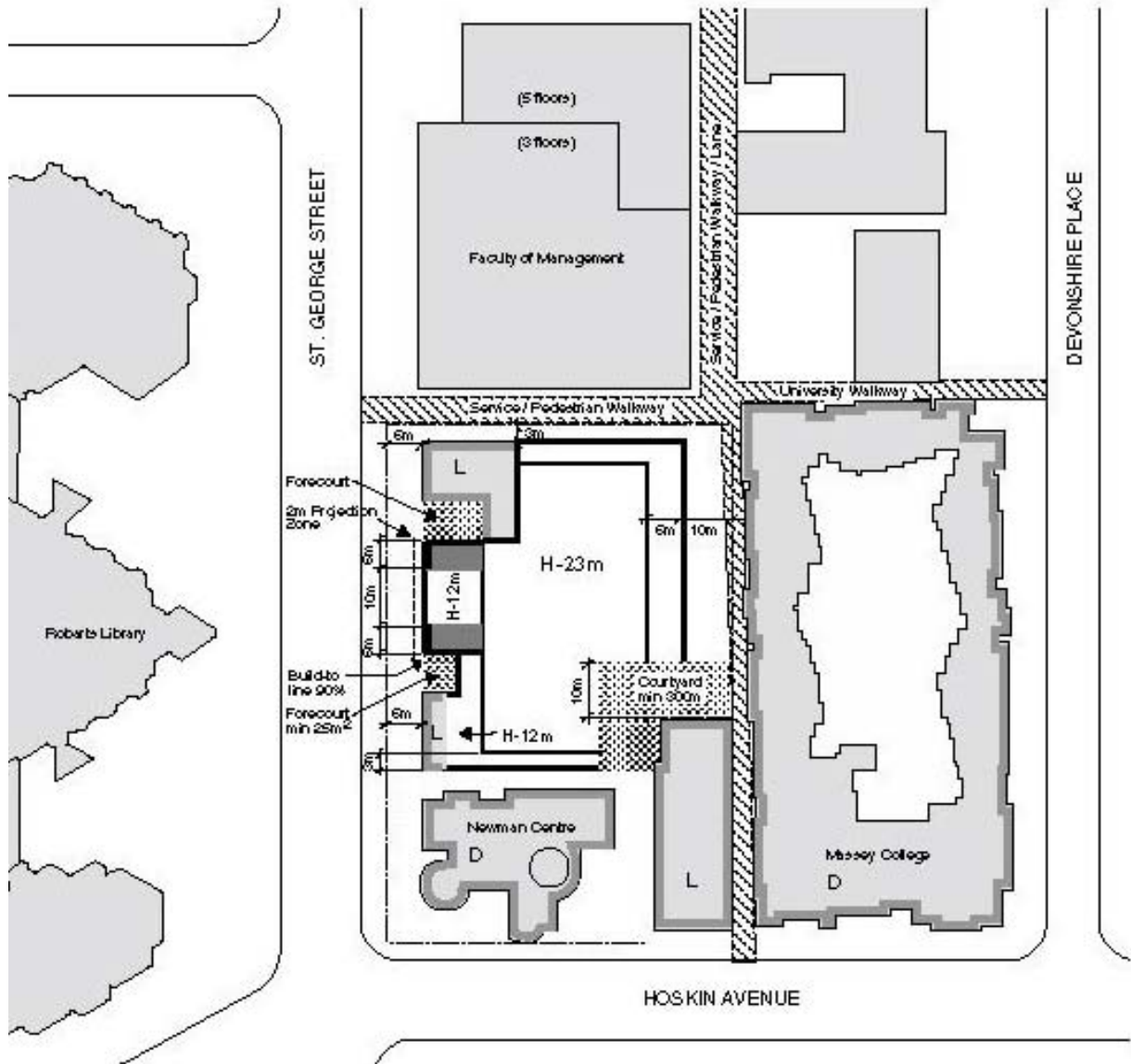
Room #	Capacity (space inventory)	Station Utilization % - Core Classes	Station Utilization % - Elective Classes	avg. class utilization (hrs/wk)	avg. other utilization (hrs/wk)	avg. all uses utilization (hrs/wk)
127	59	0	58.1	25.7	13.4	39.1
133	68	94.1	52.2	23.6	14.5	38.1
134	80	81.3	41.3	26.7	14.5	41.2
142	70	95.7	0	19.1	18.5	37.6
147	69	95.7	65.5	25.8	3.1	28.9
151	40	0	73.3	29.6	6.0	35.6
157	40	0	67.2	28.8	6.8	35.6

368	60	33.0	4.5	37.5
374	60	26.3	7.4	33.7
448	8	0.5	21.4	21.9
470	12	9.1	20.2	29.3
548	8	4.8	19.6	24.4
570	12	10.2	16.9	27.1

Note:-

1. Classrooms utilization, according to COU should be 30-34 hours per week. Rotman classes range from 18-29

Appendix 3. Site Map (Site 11 and Site 12)



- Site Boundary
- Existing Building
- Courtyard / Forecourt / Common Outdoor Space
- Walkway
- L Heritage Building (Designated / Listed)
- Construction within shaded area requires construction up to any adjacent Build to Line

91-97 St. George Street

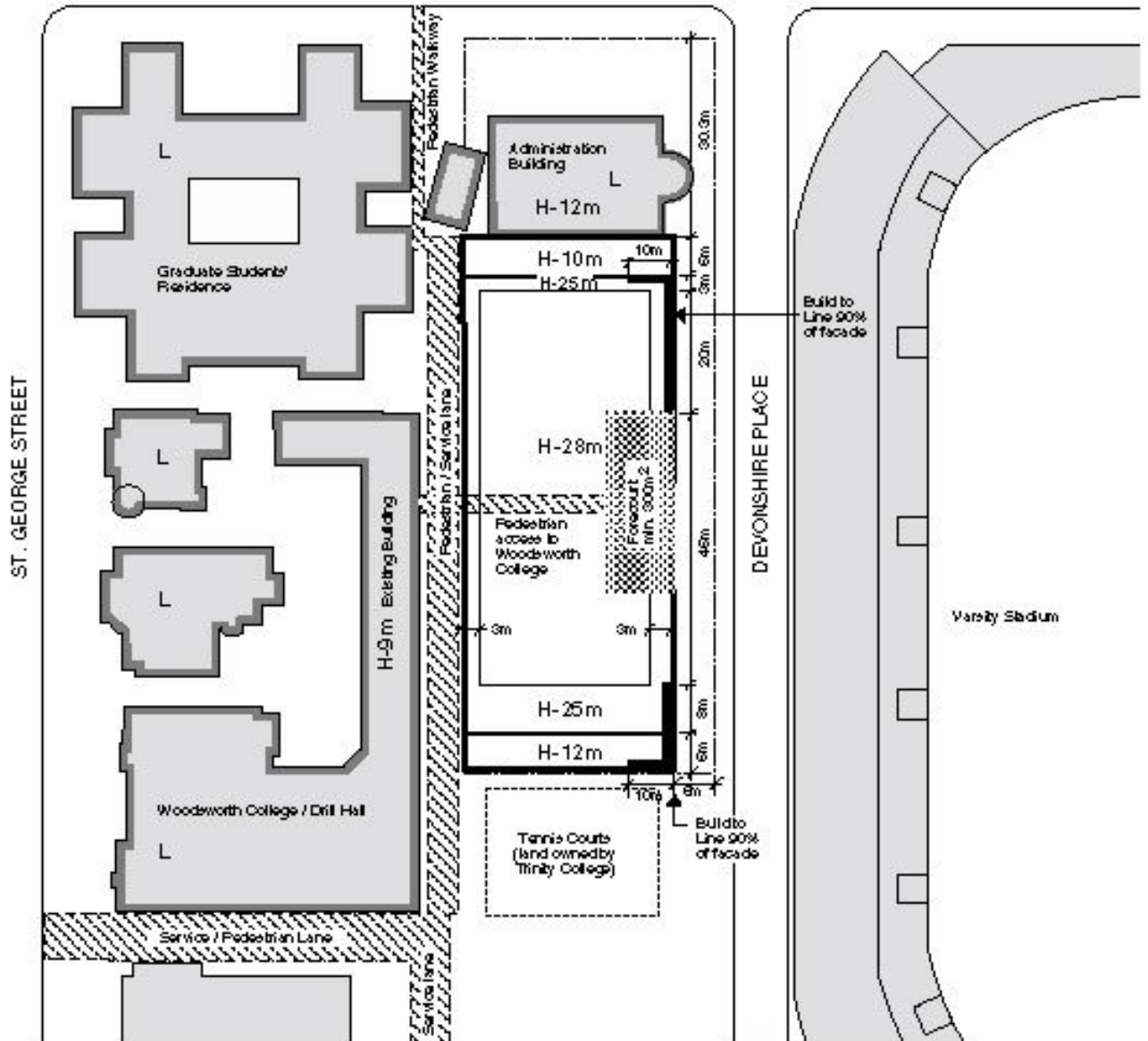
11







University of Toronto Area

City of Toronto

1997

BLOOR STREET WEST



-  Site Boundary
-  Existing Building
-  Courtyard / Forecourt / Common Outdoor Space
-  Walkway
-  Heritage Building (Designated / Listed)
-  Construction within shaded area requires construction up to any adjacent Build to Line

100 Devonshire Place
315 Bloor Street West
 University of Toronto Area

12

City of Toronto

1207

Appendix 4. Capital Cost Estimate

Joseph L. Rotman School of Management, expansion & renovations

Project Title:

TABLE 1: Total Project Cost Estimates

Items	Phase 1 new constr & reno to 2nd		Phase 2 reno to Gd & new	
Construction amount April 2007	58,263,000	1	2,447,000	1
Escalation	6,991,560	2	719,100	3
Construction Contingency	5,245,565		249,100	
Applicable GST	1,395,902		67,621	
Total, including GST	71,896,027		3,482,821	
Infrastructure Upgrades in Sector	700,000	4	0	
Secondary projects	204,000	5	0	
Hazardous Materials	0		incl	
Landscaping	0		102,000	6
Permits & Insurance	869,150		17,900	
Professional Fees	8,873,883		429,000	
Computing Infrastructure	50,000		10,200	
Telephone set & install	70,000	8	10,200	
Audio/Visual	0	9	0	
Moving	204,000		0	
Staging	0	10	10,000	
Furnishings: Department	4,617,500	8	153,000	
Equipment	0		0	
Security & access systems	250,000		4,600	
Signage: Interior & Exterior	150,000		2,000	
Signage: Donor Recognition	20,000		5,100	
Groundbreaking & Building opening	25,000		3,000	
Miscellaneous	75,000		9,000	
Project Contingency	2,795,439		161,179	
Finance Costs	1,000,000	11	0	
Total Project Cost Estimate incl GST	91,800,000		4,400,000	

prepared jcb 19th July 2007

notes

- per A W Hooker cost consultants Apr 16 2007. Phase 1 reno -725 GSM, Phase 1 new construction - 15,000 GSM, phase 2 reno - 871 GSM
- 1 15,000 GSM, phase 2 reno - 871 GSM
 - 2 escalated to a tender in Dec 2008, allow 1/2% per month for escalation beyond this.
 - 3 escalated to a tender in feb 2011
 - 4 Hydro infrastructure & connection.
 - 5 allowance to relocate current occupants.
 - 6 allowance for repair & rework at entrance.
 - 7 All AV & Computing, Office equip to be leased.
 - 8 allowance of 80% of calculated in initial move-in.
 - 9 leased by Faculty
 - 10 handled internally by Faculty.
 - 11 see estimated cashflow spreadsheet

Appendix 5. Environmental Checklist

University of Toronto Environmental Protection Policy

PREAMBLE

The University of Toronto is committed to being a positive and creative force in the protection and enhancement of the local and global environment, through its teaching, research and administrative operations. Recognizing that some of its activities, because of their scale and scope, have significant effects on the environment, the University as an institution, and all members of the university community, have the responsibility to society to act in ways consistent with the following principles and objectives:

FUNDAMENTAL PRINCIPLES

- Minimization of negative impacts on the environment
- Conservation and wise use of natural resources
- Respect for bio-diversity

SPECIFIC OBJECTIVES

In adopting these fundamental principles, the University will be guided by ethical attitudes towards natural spaces, and will take all reasonable steps to meet the following objectives:

- Minimize energy use, through efficient management and practice
- Minimize water use, through efficient management and practice
- Minimize waste generation through reduction, reuse and recycling
- Minimize polluting effluent and emissions into air, land and water
- Minimize noise and odour pollution
- Minimize and where possible eliminate use of chemicals, including outdoor salt, pesticides herbicides and cleaning agents
- Include bio-diversity and environmental concerns in planning and landscape decisions
- Meet and where possible exceed environmental standards, regulations and guidelines

IMPLEMENTATION

To implement this Environmental Protection Policy:

- An Environmental Protection Advisory Committee (EPAC) will be established consisting of administrative staff, academic staff and student groups, to be chaired by a member of the University's academic staff. The Committee will provide advice to the Assistant Vice-President, Operations and Services, on programs to meet the environmental protection objectives. Membership of the committee will be made known to the community to ensure that new and existing initiatives are brought forward for consideration. The meetings of EPAC will be open.
- Facilities and Services, through the Waste Management Department will facilitate the development, implementation and evaluation of environmental protection programs, and will liaise with the EPAC and all three campuses on the programs.
- In this role Facilities and Services will:
 - Regularly review university policies to ensure consistency with this policy;
 - Carry out appropriate environmental audits and pilot projects;
 - Undertake education and training programs to inform the University Community about this and how its members, both personally and collectively, can best meet the objectives set forth in it;
 - Inform all contractors, service operations and users of University facilities that they must comply with the requirements of the policy;
 - Annually issue a report concerning the University's impact on the environment, summarizing initiatives undertaken and identifying matters which require particular attention.

Approved by Business Board of the Governing Council on March 7, 1994.

Environmental Checklist for Users Committees (5/99)

1. General planning principles: Consideration of alternatives, Life cycle approach
2. Minimize Energy Use
 - a) Thermal Energy: Heating, Cooling
 - b) Lighting/Use of Natural Light
 - c) Ventilation/Windows
 - d) Machinery/Equipment
 - e) Orientation of Building - effect on building energy needs
 - f) Roof Design
3. Minimize Water Use (Maximize Reuse)
 - a) Flushing
 - b) Washing - hands and body
 - c) Building Cleaning
 - d) Drinking
 - e) Experimental/Labs
 - f) Equipment Cooling
 - g) Outdoor Vegetation - choice and watering (see #4)
4. Utilization and Diversion of Rainwater
 - a) Use of Roof Water
 - b) Porous Pavements
5. Waste Management (offices, classrooms, food outlets, outdoors, construction/demolition)
 - a) Reduction
 - b) Reuse
 - c) Recycling
 - d) Treatment and Disposal - possible on campus
6. Effluent and Emissions (reduce, reuse, recycle, dispose)
 - a) Indoor (Air Toxicity, Noise, Odours, Ventilation)
 - b) Outdoor Air - laboratory emissions
 - c) Water - Hazardous Wastes
 - d) Land
7. Reduce Harmful Chemicals
 - a) Outdoor Salts
 - b) Pesticides/Herbicides
 - c) Cleaning Agents
8. Outdoor Environment
 - a) Encourage Bio-diversity (encourage and protection of species)
 - b) Landscaping/Shading - effect on building energy needs in summer and winter
 - c) Use of outdoor space (e.g. rest areas, roof gardens)
9. Monitoring and Metering of Use of Resources and Wastes
 - a) Water
 - b) Electricity
 - c) Heat
 - d) Wastes
10. Visibility of Environmental Concerns
 - a) Pilot Projects
 - b) Posters/Displays
11. Material Choice (Use of endangered/exotic materials, off-gassing)
 - a) Building Fabric
 - b) Fixtures and Furnishings

Appendix 6: Cash flow Analysis

Available under separate cover

Appendix 7: Room Data Sheets

Available under separate cover