

The following Motions and Documents were considered by the GFC Academic Planning Committee at its Wednesday, February 10, 2016 meeting:

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Agenda Title: **Proposal for a new Bachelor of Science in Fashion Business Management, Faculty of Agricultural, Life & Environment Sciences**

CARRIED MOTION: THAT the GFC Academic Planning Committee approve, under delegated authority from General Faculties Council, the proposed Bachelor of Science in Fashion Business Management as proposed by the Faculty of Agricultural, Life and Environmental Sciences, and as set forth in Attachment 1, to be effective upon final approval.

Final Item: 4

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Agenda Title: **Proposed Changes to Existing Mandatory Student Instructional Fees, Proposed New Mandatory Student Instructional Support Fees, and the Updated Non-Instructional Fee Schedule**

CARRIED MOTION: THAT the GFC Academic Planning Committee approve the separation of Attachment 3, Proposed New Fees, from the Motion to approve those proposed in Attachments 1 and 2.

CARRIED MOTION: THAT the GFC Academic Planning Committee, with delegated authority from General Faculties Council, recommend the Board of Governors approve: the proposed new Mandatory Student Instructional Support Fees (set forth in Attachment 1) and the proposed Deletion of Mandatory Student Instructional Support Fee (set forth in Attachment 2), as submitted on behalf of the relevant Faculties/Departments by the Registrar's Advisory Committee on Fees (RACF), to take effect as noted in each respective attachment.

Final Item: 5a

DEFEATED MOTION: THAT the GFC Academic Planning Committee, with delegated authority from General Faculties Council, recommend the Board of Governors approve the proposed new fee (set forth in Attachment 3), as submitted on behalf of the Faculty of Medicine and Dentistry by the Registrar's Advisory Committee on Fees (RACF), to take effect on July 1, 2016.

Final Item: 5b

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Agenda Title: **University of Alberta's Comprehensive Institutional Plan (CIP) (2016)**

CARRIED MOTION: THAT the GFC Academic Planning Committee recommend to the Board of Governors the 2016 University of Alberta Comprehensive Institutional Plan (CIP), as provided by the President's Executive Committee and as set forth in Attachment 1, with the exception of information pertinent to Ancillary Services' budgets which is not within the purview of GFC APC to consider and/or recommend, to take effect upon final approval, and to empower administration to make any editorial changes to the CIP, as needed, as long as the changes do not have the force of policy.

Final Item: 6

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**OUTLINE OF ISSUE**

Agenda Title: **Proposal for a (New) Bachelor of Science in Fashion Business Management, Faculty of Agricultural, Life and Environmental Sciences**

**Motion:** THAT the GFC Academic Planning Committee approve, under delegated authority from General Faculties Council, the proposed Bachelor of Science in Fashion Business Management as proposed by the Faculty of Agricultural, Life and Environmental Sciences, and as set forth in Attachment 1, to be effective upon final approval.

**Item**

Action Requested	<input checked="" type="checkbox"/> Approval <input type="checkbox"/> Recommendation <input type="checkbox"/> Discussion/Advice <input type="checkbox"/> Information
Proposed by	Scott Jeffrey, Associate Dean Academic, Faculty of Agricultural, Life and Environmental Sciences Deanna Williamson, Chair, Department of Human Ecology
Presenter	Kathryn Chandler, Department of Human Ecology
Subject	Bachelor of Science in Fashion Business Management

**Details**

Responsibility	Provost and Vice-President (Academic)
The Purpose of the Proposal is (please be specific)	The Bachelor of Science in Fashion Business Management (FBM) constitutes a new degree program that builds on current business management programming in the Faculty of Agricultural, Life, and Environmental Sciences (ALES) in collaboration with the School of Business. The University of Alberta has expertise and course offerings in the individual areas of business management and fashion studies that have been in existence for many years, and the University's expertise and capacity to support the FBM degree program is predicated on the already demonstrated success of the current business management programs: BSc Agricultural/Food Business Management and BSc Forest Business Management.
The Impact of the Proposal is	The proposed FBM degree program will provide a new academic opportunity for students that will lead to specialized managerial jobs within fashion industries. Graduates with a FBM degree will be able to demonstrate depth of knowledge and competency in two well-defined areas: business and fashion. A desire to incorporate a stronger business component into their programs has been voiced by increasing numbers of Human Ecology students, and conversely, a demand for a stronger fashion industry focus has been voiced by commerce students who have taken Human Ecology electives.
Replaces/Revises (eg, policies, resolutions)	N/A
Timeline/Implementation Date	Expected implementation date Fall 2017/18
Estimated Cost	No additional resources required
Sources of Funding	Existing resources and standard tuition
Notes	Once approved through institutional governance, this proposal will be submitted to Government for approval. No new resources are required to implement or sustain the program which will use existing program structures and current course offerings taught by permanent, full-time faculty already in place. In response to a question raised at the GFC Academic Standards Committee, the response numbers to the student survey were added to

	the proposal prior to GFC Academic Planning Committee consideration.
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**Alignment/Compliance**

<p>Alignment with Guiding Documents</p>	<p><b>Aligns with Dare to Deliver; Dare to Discover values</b> (enrich the student experience; foster new joint degree programs that unite academic units/professional schools; promote interdisciplinary collaboration, create learning opportunities for students and creative collaborations to address global challenges and initiatives; provide an intellectually superior educational environment for students; diverse, yet inclusive, dynamic collegial community that welcomes change)</p>
<p>Compliance with Legislation, Policy and/or Procedure Relevant to the Proposal (please <u>quote</u> legislation and include identifying section numbers)</p>	<p>1. <b>Post-Secondary Learning Act (PSLA):</b> The PSLA gives GFC responsibility, subject to the authority of the Board of Governors, over academic affairs (Section 26(1)). Further, the PSLA gives the Board of Governors authority over certain admission requirements and rules respecting enrolment (Section 60(1)(c) and (d)). The Board has delegated its authority over admissions requirements and rules respecting enrolment to GFC. GFC has thus established an Academic Standards Committee (ASC).</p> <p>2. <b>PSLA:</b> GFC may make recommendations to the Board of Governors on a number of matters including the budget and academic planning (Section 26(1)(o)). GFC delegates its power to recommend to the Board on the budget and on new or revised academic programs to the GFC Academic Planning Committee (APC).</p> <p>3. <b>PSLA:</b> The PSLA gives Faculty Councils power to “provide for the admission of students to the faculty” (29(1)(c)).</p> <p>4. <b>PSLA:</b> The PSLA gives Faculty Councils the authority to “determine the programs of study for which the faculty is established” (Section 29(1)(a)); to “provide for the admission of students to the faculty”(Section 29(1)(c)); and to “determine the conditions under which a student must withdraw from or may continue the student’s program of studies in a faculty” (Section 29(1)(d)).</p> <p>5. <b>UAPPOL Admissions Policy:</b> “Admission to the University of Alberta is based on documented academic criteria established by individual Faculties and approved by GFC. These criteria may be defined in areas such as subject requirements, minimum entrance averages, and language proficiency requirements. In addition to academic requirements for admission, GFC authorizes each Faculty to establish such other reasonable criteria for admission of applicants as the Faculty may consider appropriate to its programs of study, subject to the approval of GFC (e.g. interview, audition, portfolio, etc.) The admission requirements for any Faculty will be those approved by GFC as set forth in the current edition of the University Calendar. In addition to the admission requirements, selection criteria for quota programs, where they exist, will also be published in the current edition of the University Calendar. The responsibility for admission decisions will be vested in the Faculty Admission Committees or in the Deans of the respective Faculties, as the councils of such Faculties will determine.”</p>

**6. GFC Academic Standards Committee (ASC) Terms of Reference (3. Mandate of the Committee):** The Office of the Provost and Vice-President (Academic) has determined that the proposed changes are substantial in nature. ASC's terms of reference provide that "the term 'substantial' refers to proposals which involve or affect more than one Faculty or unit; are part of a proposal for a new program; are likely to have a financial impact; represent a definite departure from current policy; involve a quota; articulate a new academic concept" (3.A.ii). Further, "ASC provides advice or recommends to the GFC Academic Planning Committee (APC) on proposals which involve substantial change to admission/transfer regulations or academic standing." (3.B.iv)

**7. GFC Academic Planning Committee (APC) Terms of Reference (3. Mandate of the Committee):**

"8. Establishment/Termination of Academic Programs

NOTE: APC deals with major program matters; minor program matters are dealt with through the GFC-mandated course/program approval process. The Provost and Vice-President (Academic) decides what is major or minor.

a. To approve the establishment of new academic programs at the University of Alberta or those administered in cooperation with other post-secondary institutions."

**8. Board Learning and Discovery Committee (BLDC) Terms of Reference:**

"3. MANDATE OF THE COMMITTEE

Except as provided in paragraph 4 hereof and in the Board's General Committee Terms of Reference, the Committee shall, in Accordance with the Committee's responsibilities with powers granted under the Post-Secondary Learning Act, monitor, evaluate, advise and make decisions on behalf of the Board with respect to matters concerning the teaching and research affairs of the University, including proposals coming from the administration and from General Faculties Council (the "GFC"), and shall consider future educational expectations and challenges to be faced by the University. The Committee shall also include any other matter delegated to The Committee by the Board.

Without limiting the generality of the foregoing the Committee shall:[...]

c. review and approve recommendations of GFC for major changes in instructional and research programs and other academic matters[.]

[...]

**4. LIMITATIONS ON DELEGATION BY THE BOARD**

This general delegation of authority by the Board to the Committee shall be limited as set out in this paragraph.

Notwithstanding the general delegation of authority to the Committee as set out in paragraph 3, the Board shall

make all decisions with respect to: [...] b. program approvals involving the creation or abolition of a degree program (but not specializations of an existing degree)."

	<p><b>8. PSLA Program of Study Regulation:</b> Application for approval. 2. The following must apply for approval, in the form required by the Minister:</p> <p>(a) a public post-secondary institution that proposes to establish, extend, expand, reduce, suspend, terminate or transfer a degree program or a diploma or certificate program offered or to be offered in Alberta.</p> <p><b>9. PSLA:</b> “The Campus Alberta Quality Council may inquire into and review any matter relating to a proposal to offer a program of study leading to the granting of an applied, baccalaureate, master’s or doctoral degree other than a degree in divinity.” (Section 109(1))</p>
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**Routing** (Include meeting dates)

<p>Participation: (parties who have seen the proposal and in what capacity)</p> <ul style="list-style-type: none"> <li>• Those who have been informed</li> <li>• Those who have been consulted</li> <li>• Those who are actively participating</li> </ul>	<p>Human Ecology Program Committee (includes student representatives from the Human Ecology Students’ Association) Human Ecology Students (survey, July 2014) Agricultural, Life &amp; Environmental Studies (ALES) Business Management Program Committee Faculty of Business Office of the Provost and Vice-President Academic Office of the Registrar Canadian Universities and Colleges (see proposal for details) Relevant professional bodies (see proposal for details)</p>
<p>Approval Route (Governance) (including meeting dates)</p>	<p>Faculty of Business – February 19, 2015 Faculty of Agricultural, Life and Environmental Sciences – March 2, 2015 GFC Academic Standards Committee – January 21, 2016 GFC Academic Planning Committee – February 10, 2016</p>
<p>Final Approver</p>	<p>GFC Academic Planning Committee – February 10, 2016 Alberta Advanced Education</p>

Attachments (each to be numbered 1 - <>)

1. Attachment 1 (pages 1 - 71): PAPRS New Degree Proposal: combined Part A and Part B
2. Attachment 2 (pages 1 - 3): Calendar Changes
3. Attachment 3 (page 1): Potential External Reviewers
4. Attachment 4 (page 1): Letter of Support, Alberta School of Business
5. Attachment 5 (pages 1 – 2): Library Impact Statement

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## **New Degree Proposal Template (Part A: System Coordination Review)**

The following template outlines the information required by Advanced Education and Technology to support System Coordination Review, the first of the two stages in the review process for new degree programs and new specializations in existing degree programs. Completed templates are to be submitted electronically through the ministry's Program and Provider Registry System.

The guiding premise of System Coordination Review is to ensure that the program adds value to Campus Alberta. This stage of review will focus on the institution's assessment of student and employer demand; the situation of the program in the context of Campus Alberta; and the financial viability of the program, including implications for students and taxpayers.

Given a positive outcome from System Coordination Review, the proposed program will be recommended to the Minister for referral to Campus Alberta Quality Council for quality assessment, the second stage of review. Please refer to the council's publication, CAQC Handbook: Quality Assessment and Assurance, for further information. This publication is available on the Council's website <http://caqc.gov.ab.ca>.

### ***Basic Information***

<b>Institution</b>	<b>University of Alberta</b>
<b>Program/specialization title</b>	<b>Bachelor of Science in Fashion Business Management</b>
<b>Credential awarded</b>	<b>BSc</b>
<b>Proposed Implementation Date</b>	<b>September 2017</b>

## **SECTION 1: PROGRAM OVERVIEW**

### **1.1 Type of Initiative**

*New degree program; or new specialization(s) in existing program.*

The B.Sc. in Fashion Business Management (FBM) constitutes a new degree program that builds on current business management programming in the Faculty of Agricultural, Life, and Environmental Sciences (ALES) in collaboration with the School of Business. The University of Alberta has expertise and course offerings in the individual areas of business management and fashion studies that have been in existence for many years, and the University's expertise and capacity to support the FBM degree program is predicated on the already demonstrated success of our current business management programs: B.Sc. Agricultural/Food Business Management and B.Sc. Forest Business Management.

The new degree will be comprised of a combination of existing program structures and current course offerings, taught by permanent, full-time faculty, already in place. The professors who will be involved in the delivery of the

FBM program are members of the academic staff within the Faculty of ALES and the School of Business, specifically in the departments of: Resource Economics and Environmental Sociology; Human Ecology; Marketing, Business Economics and Law; Strategic Management and Organizations; and Accounting, Operations and Information Systems.

The FBM degree program will increase our capacity to formally bring together expertise and research from both business management and fashion studies to enrich the undergraduate student experience, and the quality of the program will be ensured through the employment of highly qualified academic staff, experiential learning opportunities, rigorous entrance requirements, and enrolment management.

## **1.2 Program Description**

*Provide a brief (1-2 paragraphs) description of the program, summarizing its intended purpose, curriculum design, and methods of delivery and highlighting distinctive attributes. Attach as an Appendix a complete list of courses, including credit values, instructional hours and brief (calendar style) course descriptions. For elective options, specify course selection parameters. Identify new courses to be developed for this program.*

The contemporary world of fashion moves faster and reaches more people than ever before, and most importantly, it has become more business-oriented. It's an anomaly that while the fashion industry generates trillions of dollars in sales and vast employment around the globe, fashion studies students are often ill-prepared in understanding the business and strategic management elements that contribute to commercial success. The proposed degree program aims to rectify this problem by developing graduates with the analytical, planning and management tools, leadership skills, and ethical values required of business professionals working within fashion industries.

The Fashion Business Management (FBM) degree program combines an understanding of marketing and management principles with knowledge of the theoretical and practical processes involved in fashion production, distribution, and consumption. It will be offered jointly by the Faculty of Agricultural, Life and Environmental Sciences (ALES) and the School of Business. Administration will be managed by the Faculty of Agricultural, Life and Environmental Sciences in consultation with an interdisciplinary committee with representation from both ALES and the School of Business.

The FBM degree program is unique in that it combines expertise from two distinct fields - business and fashion - in a focused and purposeful way. U of A students currently interested in learning about fashion business management typically pursue either a commerce degree or a human ecology degree. If they choose a degree in commerce they are limited in the number of fashion-related courses they can take. Similarly, if they choose a degree in human ecology they are limited in the number of business-related courses they can access. The FBM degree program offers a logical and desirable option for students wishing to combine business and fashion courses in a balanced and specialized way. Courses comprising the proposed degree program include accounting, business law, marketing, operations management, human resources, product design and development, textile science, fashion industries, globalization, and international trade (see Appendix 1 for the curriculum design, complete list of courses, and proposed calendar listings).

Approval of this proposal will provide students with enhanced opportunities for employment in a number of fashion business-related fields. Graduates of this program will be uniquely positioned to pursue careers in fashion management, marketing and sales, buying, production, or research and policy.

### 1.3 Enrolment Plan

Include assumptions and explanatory notes (e.g., attrition, part-time enrolment). Also:

- If program implementation will occur over a number of years, provide data for each year to full implementation.
- If internal reallocation of existing resources is proposed, describe any anticipated decrease in enrolment in other programs that would result.

Proposed Enrolment	Year 1	Year 2	Year 3	Year 4	Annual Ongoing
<b>Total head count</b>	10	17	19	21	21
• Full-Time Year 1	3 YRS ONLY - NOT A DIRECT ENTRY PROGRAM				
• Full-Time Year 2	5	7	7	7	7
• Full-Time Year 3	5	5	7	7	7
• Full-Time Year 4	0	5	5	7	7
<b>Total FLE</b>					
• FLE Year 1					
• FLE Year 2	4	6	6	6	6
• FLE Year 3	4	4	6	6	6
• FLE Year 4	0	4	4	6	6
<b>Anticipated No. of Graduates</b>		4	4	6	6

Enrolment of approximately 5-7 students per year is expected in the FBM program. Registration will be managed in accord with an agreement reached between the School of Business and the Faculty of ALES which sets a cap of 75 students across the three years of all the ALES/School of Business joint degree programs (i.e., Agricultural/Food Business Management, Forest Business Management and Fashion Business Management combined). To help manage enrolment and ensure student success, higher entrance requirements and enrolment caps for the FBM degree program will be put in place.

Enrolment in the FBM degree program may result in a small reduction in student numbers in the Clothing, Textiles and Material Culture (CTMC) major of the B.Sc. Human Ecology program. There may also be a small reduction in student numbers for commerce degrees with marketing or retailing specializations, as the FBM program is somewhat related. Any reduced enrolment in these programs is not expected to be significant, however, and will be compensated (if not exceeded) by the enrolment in the FBM degree program. The primary intent behind this proposal is to offer a better program fit for students currently on campus, especially those in the CTMC major with an interest in the business side of fashion.



## **SECTION 2: DEMAND**

### **2.1 Student Demand Analysis**

*Analysis should be supported by relevant data for the region and for Campus Alberta, as might be derived from: systematic questionnaire surveys of target audiences; application and enrolment summaries and trends for similar programs currently offered by other institutions; tabulations of unsolicited student inquiries and/or expressions of interest obtained at student recruitment events; demographic projections for relevant sub-populations.*

The University of Alberta primarily serves students in the greater Edmonton area and it is a preferred post secondary institution for many. In the Department of Human Ecology, the Clothing, Textiles and Material Culture (CTMC) major is a long-standing and sought-after course of study that attracts an average of 25 students per year. Enrolment across the four years of study in the CTMC major has averaged 100 students over the past ten years (2005-2015) with a peak of 125 students enrolled in 2011. Within the CTMC major, students choose a minor and the majority of these (approximately 70%) select fashion merchandising. The fashion merchandising minor gives students access to selected marketing, accounting, and strategic management courses. A desire to incorporate a stronger business component into their programs has been voiced by increasing numbers of Human Ecology students, and conversely, a demand for a stronger fashion industry focus has been voiced by commerce students who have taken Human Ecology electives. The current strong interest in the fashion merchandising minor suggests a high demand for the additional marketing and other business-related courses that the FBM program is poised to deliver.

Regarding this strong interest please see Appendix 4 for results of a feedback survey distributed in July 2014 to 40 senior students registered in the CTMC major. There was a 27% response rate to the survey and results indicated that these students desired additional courses with respect to entrepreneurship, fashion retailing management, and business and strategic management in particular. Students noted that their specific career goals would be enhanced by the proposed program, given their interest in entrepreneurship and business ownership in the fashion retail sector.

Informal feedback from visiting prospective high school students and their teachers also indicate support for the proposed program. For example, when a group of 'Fashion Studies 30' students from Harry Ainlay High School were attending a recent School of Retailing event, a majority said they would be very interested in the proposed degree program because it combined their interests in fashion and business perfectly. Their teacher also expressed interest because the program represented viable training for her aspiring fashion entrepreneurs. The students eagerly asked when the program would be operational.

(Kathryn Chandler, Human Ecology Practicum Coordinator, personal communication, July 2015).

Enrolment data from related programs is limited. However, information available on the Olds College and Kwantlen University websites suggests that their fashion-related programs have capped enrolments. The Apparel Technology Diploma program at Olds College, for example, accepts a maximum of 18 students/year and the Fashion Marketing Diploma at Kwantlen University accepts up to 30 students/year. Student demand for these programs is unlikely to be affected by the FBM program because of the enrolment caps and somewhat distinct geographic capture areas for each institution.

The proposed FBM degree program is expected to impact prospective students positively by providing a new academic opportunity that will lead to specialized managerial jobs within fashion industries. Graduates with a FBM degree will be able to demonstrate depth of knowledge and competency in two well-defined areas: business and fashion. Consequently, they may be able to move *directly* into strategic planning and managerial roles without the need for further specialized training and education, which some current CTMC students feel they must pursue in order to secure the senior specialized jobs they seek.

## 2.2 Labour Market Analysis

*Analysis should be supported by relevant data and placed in the context of the target occupational/regional labour market(s). Relevant data sources include systematic surveys of prospective employers; occupational supply/demand projections from government or industry sources; tabulations of job postings/‘help wanted’ advertising; surveys of recruitment and graduate employment rates of similar programs; and demographic projections (i.e. for relevant regions and sub-populations.) Describe anticipated employment outcomes.*

Demand for skilled and educated, ‘white collar’ employees in both the manufacturing and retailing sectors of the fashion industry is increasing in Alberta and across Canada. Despite concern over reduced employment and manufacturing capacity in Canada’s textile and apparel industries resulting from increased global competition, there are successful niche companies that are thriving, as the quote below suggests. Canadian apparel manufacturing firms have increasingly moved towards niche markets, designing and producing high-end clothing, as well as specialty and high R&D garments including performance apparel such as sportswear and protective clothing. Some of these companies are located in Alberta (e.g. Marks, FGL Sports, Triple Flip) and will require new management talent that would be ideally met by FBM graduates with *combined* business and fashion studies backgrounds.

“Canada’s textiles and apparel industry has gone through a painful transformation over the past decade, shrinking by more than half as a result of competition from developing economies. However, the industry has achieved success in recent years by focusing on high-value activities and products (such as high-end suits and safety attire), and by taking advantage of low-cost inputs from those same developing economies” (Conference Board of Canada, April 2012).

The need for an increased focus on management capability was clearly identified in a study conducted by Industry Canada to evaluate the health of Canada’s apparel industry. The following key aspects were lacking in a survey of participating companies:

### *Percent of Companies With and Without Key Attribute in Place*

<i>Attributes</i>	<i>Not in Place</i>	<i>In Place</i>
Culture open to change	27%	73%
<b>Strong management team</b>	<b>58%</b>	42%
History of being proactive	73%	27%

(<http://www.ic.gc.ca/eic/site/026.nsf/eng/00091.html>, Retrieved July 9, 2014, Figure 4.1a)

In general, the need for highly educated, 'white-collar' employees who possess management capacity, is seen to be a driver of future success for keeping the apparel manufacturing sector vibrant in Canada (see quote below), and the FBM degree program will help meet this need.

“... the global value chain model highlights the many complex elements of the apparel industry (i.e. product development, innovation, market research, trend identification and setting, understanding of niche markets in Canada and the US, highly educated workforces, marketing talent, etc.). While Canadian companies may not be well positioned as cost competitive manufacturers, in many respects, they should be better poised to take advantage of these other opportunities than low wage competitors”  
(<http://www.ic.gc.ca/eic/site/026.nsf/eng/00091.html>, Retrieved July 9, 2014 - A Canadian Approach to the Global Apparel Value Chain, Industry Canada, 2008).

The need for the timely implementation of the proposed program to help increase the management pool for Canada's apparel industry is further supported by data contained in a 2014 report prepared for the Canadian Apparel Federation. The report indicates that the 'savings' gap between imported and domestic apparel is shrinking when you factor in the full cost of doing business, taking into account such factors as product control, transportation costs and time lags. As such, the climate for promoting growth in the industry is promising, evidenced by declarations such as, “every \$1M of Canadian apparel manufacturing triggers \$591K in employment earnings” (Made in Canada: What's It Worth? - A Study of the Economic Contribution of the Canadian Apparel Domestic Manufacturing Supply Chain, Dec. 2014, Milstein & Co). Increased domestic manufacturing will be critical for fostering innovation in textiles and apparel and for creating and maintaining white collar employment.

To this end, the federal government (Service Canada) is currently offering salary subsidies to Canadian apparel companies to help Canadian post-secondary students transition into the apparel industry workforce. These subsidies provide support to apparel companies to hire eligible young graduates - such as those the proposed degree program will help to prepare!

In terms of the retail sector, the need for strategic business planning has never been greater as change occurs at an ever increasing pace in terms of both technology applications in the marketplace and consumers' expectations. Fashion retailers need highly educated graduates with combined product and business knowledge.

“Even the most current retail strategies, built on the latest consumer information, with cutting-edge technologies, can have an increasingly short shelf life in this new world order. In this current environment, retailers must be especially nimble, but those who stay ahead of the curve will be the ones willing to invest in technology, talent, and process to capitalize on customer insights” (<http://www.retailcouncil.org/sites/default/files/documents/KPMG-RCC-50-ENG.pdf#page=18> Celebrating Canadian Retail, Retail Council of Canada, 2013, p.15).

Despite concerns over the consequences of the suffering resource sector in Alberta on the overall economy, retail growth is continuing. For example, the world's top selling Lululemon store is located in West Edmonton Mall, with annual retail sales of \$25 million dollars. They are planning to double their space at this location, with sales expectations that could top that of most suburban department stores (Retailer Insider, Oct. 25, 2015). See Appendix 5.

## 2.3 Support

*Provide evidence of consultation with and approval/support from relevant professional organizations, regulatory bodies, advisory committees, employers, and/or industry.*

The needs of employers were closely considered in developing this degree. Most of the employers that were consulted expressed interest in hiring graduates who understand both the creative and business sides of fashion, and who can step into strategic planning and management roles within the industry. Long term impact of the FBM program on employers will be an increase in the pool of workers with relevant education and skills. Short term impact may include increased demand for industry partnerships as students complete capstone projects and take part in internship and co-op programs. Based on the willingness of many employers to partner with Human Ecology on class projects and practicums for students in the CTMC major, an enthusiastic willingness to partner with the FBM program is also expected.

Below are quotes from some of the employers that were consulted. See Appendix 2 for complete consultations.

*"This degree would be awesome...the biggest challenge we have to overcome as retailers is finding people that understand the economics, accounting (open to buy) turns, as well as the technical components of fashion (fit, style, quality). So many people just like the fashion and marketing components but there is so much more than that to a successful operation of a retail business...it is a constant challenge and cost for a retailer to bring someone up to the level you need to operate successfully."*

– Gay Derk, Owner, Derks Fine Group of Companies, Edmonton

*"I think this is a great degree. Many friends of mine have had to go to London England or New York to get a similar degree...I think it better sets up a student with skills and knowledge for the work environment they would go into. Also at the end of the day it is a business and I don't see many students coming out of university with that kind of thinking. The skills we need students to have is an understanding of buying process, target markets, sales forecasts, open to buys, and relationship between product development and sales plans."*

– Sandra Correia, Co-owner, FLOC Boutique, Edmonton

*"This sounds like well-rounded studies...I think often times the business side is missing and it's the most challenging side of fashion retail. What I keep finding in the industry is a disconnect between the creativity and business acumen that needs to exist."*

– Kim Hill, Owner, Thread Hill Boutique, Edmonton

*Currently, students with a keen interest in Fashion Business Management often choose to move elsewhere to study due to the lack of comprehensive training available here in Edmonton. As the fashion industry continues to grow in Alberta, there is a real need to offer students comparable education to what is already offered in other schools across the country and internationally.*

– Louise Dirks, Owner, Gravitypop, Edmonton, Calgary, Vancouver, Toronto

*"I definitely see a benefit to this program. As a retailer with a head office in Alberta we support corporate roles in a variety of areas that this degree would feed into including purchasing, allocations and replenishment, merchandise management, product development, assortment planning, and retail buying. ...a stronger relationship with the U of A will help us net the talent*

*we're seeking to develop our private label brand."*

– Shella Phang, Human Resource Manager, FGL Sports, Calgary

*"...what I need for future employees in our business... [are] focused, serious, strong, tough, smart, hard-working fashion knowledgeable individuals. I know, I am asking for a lot. However, Western Canada is greatly missing potential employees with a Fashion Business education. Currently those students leave for Toronto and New York and they do not return. A fashion business such as ours, here in Edmonton, ends up having to start from the beginning and teach our employees ourselves, involving too much of our time and resources. My dream is to one day hire someone straight from a Fashion Program that already knows how to do most of the things I currently have to teach them to do or end up doing myself."*

- Chery Kozak, Owner, Morris Furs, Hudson's Bay Fur Licensee for Western Canada

Additionally, from an industry perspective, commentary from Apparel Connexion (formerly known as the *Apparel Human Resources Council*) is relevant. This organization is a national, industry-led, independent, non-profit organization representing human resources development in the apparel manufacturing industry. They are exhorting government, retailers, consumers and educational institutions to prevent further erosion of the domestic supply chain. Drawing on new graduates with strategic management capability will be vital in accomplishing regrowth of the apparel industry in Canada.

## **2.4 Clinical or Work Experience**

*If clinical or work experience is an essential part of program delivery:*

2.4.1 *Provide evidence that the placements will be available when needed.*

2.4.2 *Describe the student's role in securing placements.*

2.4.3 *Explain how the institution will supervise/monitor the learning experience of students in off-site settings?*

2.4.4 *Identify potential employer/employee liability related to this aspect of the program, and how the institution intends to manage this liability.*

Clinical or work experience is not a required component of the FBM degree program. Students in the program, however, will have access to the cooperative education program within the School of Business. Business co-op students secure their own work placements. Many fashion-related businesses post co-op jobs so FBM students will have appropriate postings for which to apply. In addition, current industry partners of the Human Ecology Practicum Program, which offer practicum placements for CTMC students, will be encouraged to offer co-op placements to FBM students through the cooperative education program in the School of Business.

In regards to supervision of students, all co-op work terms must be approved by the Alberta School of Business and progress on the work site is monitored and evaluated by both the University and the workplace supervisor. A Co-op Coordinator conducts a site visit during each 4 month work term. All work experience courses are graded on a pass-fail basis and evaluation of each work term is determined by a student's job performance and the completion of a work term report.

Further details on the operation of the cooperative education program can be found on the following website:

<https://business.ualberta.ca/careers/cooperative-education/prospectivestudents/howcoopworks>

## **SECTION 3: INSTITUTIONAL AND SYSTEM CONTEXT**

### **3.1 Institutional Strategy**

*How does the proposed program align with the institution's strategic priorities and the Comprehensive Institutional Plan?*

- a) **Attracting Talented People:** The new program is a collaboration between existing institutional partners, which fosters a collegial and cooperative teaching culture that attracts and engages undergraduate students. The collaboration between the Faculty of ALES and the School of Business will enhance the delivery of two relevant areas of expertise (fashion and business management) integral to developing a unique and comprehensive program for domestic and international students.
- b) **Providing Meaningful Learning Opportunities:** By affording students the opportunity for in depth exploration of both fashion and business concepts, the new program creates an environment for students to work with like-minded peers, graduate students, and professors. A capstone class and other experiential learning opportunities including the ALES internship program and the Business Co-Op program, are opportunities available to students in this program to further enrich their undergraduate student experience.
- c) **Connecting Communities:** The FBM degree program will graduate sought-after professionals whose focused skill sets will be relevant locally, nationally, and globally. This program will prepare graduates who can meet the complex and demanding needs of the growing fashion retail industry in Alberta in particular, as seen with the recent influx of American companies into Edmonton and Calgary. See Appendix 5 for more information regarding the economics of fashion in Canada.
- d) **Transformational Stewardship:** The proposed program was conceived and developed based on input from Human Ecology students (see Appendix 4), employers, external stakeholders, and faculty members to enhance the relevance and expertise of graduates seeking careers in fashion related industries. The proposed initiative in fashion business management will be transformational for students and other stakeholders as it will help fill the existing gap in availability of potential management level staff for fashion apparel and retailing industries.

### **3.2 Institutional Programs**

*Explain how the proposed program fits with existing programs at the institution, and the anticipated positive or negative impacts on other programs.*

The current Clothing, Textiles and Material Culture (CTMC) major within Human Ecology, Faculty of ALES, offers a comprehensive fashion studies program that goes beyond the more singular design focus found in other post-secondary fashion programs. CTMC students explore fashion-related content across a diverse range of courses including textile science, material culture, economics, design, dress and culture, history of costume, and textile and apparel policy and trade. Informed by research and scholarship, students in the CTMC major study the social and economic importance of global textile and apparel industries and gain insight into the design, production, and consumption of apparel and textile products. The CTMC major serves the needs of most students and potential employers well; however, a stronger business management focus would be advantageous for some students and employers.

Within the CTMC major, students pursue one of four minors, the most popular of which is fashion merchandising. Over 70% of students choose this minor because it includes marketing courses that add currency to their CTMC studies. Students with a fashion merchandising minor often request if they can

take additional business courses within their degree. However, the need to meet overall degree requirements does not permit them the addition of an increased number of business courses. To meet the needs of students wanting a greater business focus to their degree, the Human Ecology undergraduate program committee recommended that a new degree be created that incorporates more marketing courses as well as courses in business practice, management, operations, sales and distribution.

As indicated in section 1.3, enrolment in the FBM program may result in slightly reduced enrolment in the CTMC major in Human Ecology, and in the School of Business (marketing) and School of Retailing programs at the University of Alberta if some students opt instead for the combined fashion/business degree after their first year. However, the FBM program option might draw additional prospective students to the U of A; students who might not otherwise have felt themselves suited to pursuing the current Human Ecology or Commerce degrees.

### **3.3 Internal Review and Approval**

*Provide a brief description of the internal review and approval process followed in developing the proposal.*

The FBM degree program was initiated in the Department of Human Ecology and developed in consultation with the Business Management Program Committee in the Faculty of ALES and the School of Business. Input from all stakeholders was incorporated into the final design of the program.

Once completed, the program proposal was approved by (in sequence) the Human Ecology Department Council, the Resource Economics and Environmental Sociology Department Council, the ALES Academic Coordinating Committee, ALES Faculty Council, and the School of Business Faculty Council. Following internal Faculty approvals, the proposal was forwarded to the Provost's Office for steering through ASC, SOS, APC, System Coordination Review (Ministry), in preparation for the request for an expedited review by CAQC.

### **3.4 Campus Alberta Programs/Initiatives**

*Discuss the relationships (similarity, complementarity, transfer, competition) of the proposed program to other programs or initiatives in Campus Alberta and explain what the proposed program would add to the system. If the proposed program would duplicate existing programs, explain why that duplication is warranted.*

Within Alberta there are three other post-secondary programs that offer fashion-related programming:

1. Olds College, in Olds, Alberta, offers an eight-month Fashion Marketing Certificate in which students learn about marketing, displaying and selling fashion products, and a two-year Apparel Technology Diploma that focuses on apparel design and construction.
2. Lethbridge College, in Lethbridge, Alberta, offers a Diploma in Fashion Design and Sustainable Production. The two-year program provides an introduction to sustainability in the apparel industry and focuses on the design and production side of the fashion industry. Students in this diploma program may be able to transfer into the Bachelor of Management program at the University of Lethbridge but a direct transfer agreement does not exist.
3. The Alberta College of Art and Design (ACAD) in Calgary, Alberta, offers a Bachelor of Design degree program that includes course options in fibre arts, visual communication

and design, material culture, advertising, jewelry design and construction, drawing, and art history.

Outside Alberta there are various diploma, certificate, and degree programs that have either a fashion design or fashion business focus (see part B for details on these and other fashion-related programs in Canada). Those with fashion/business content include:

1. Diploma in Fashion Business at Seneca College in Toronto;
2. Diploma in Fashion Management in at George Brown College in Toronto;
3. Fashion Marketing Diploma at Kwantlen Polytechnic University in Surrey, B.C.;
4. Bachelor of Commerce in Fashion Management at Humber College in Toronto.

The Fashion Business Management degree will be the only one of its kind in Alberta, and in fact in all of western Canada. The combined content and delivery afforded by the collaboration between the Faculty of ALES and the School of Business may be a significant draw for prospective domestic and international students, enhancing the University's reputation for developing innovative undergraduate programs. In addition, this new offering will contribute to the Campus Alberta vision by providing a program that uniquely builds on fashion-related programming offered at colleges and universities like Olds, Lethbridge, and ACAD.



### **3.5 Consultation**

*Summarize the type and outcomes of consultations with other institutions offering related programs. Attach copies of relevant documents (e.g. letters, meeting summaries). Discuss the potential for inter-institutional collaboration.*

In anticipation of the development of the FBM program, Human Ecology faculty members and the Associate Dean (Academic), held meetings with representatives from ACAD and Olds College in the fall of 2014. Our aim was to improve our knowledge of each institution's undergraduate programming and to confirm the unique value of our proposed new program. See Appendix 3 for a summary of this meeting.

At that time, there was discussion of a proposed 2+2 program between ACAD and Olds College for a Bachelor of Design degree in Fashion. Our current understanding is that this initiative is no longer being pursued. While we did not view this collaboration as a direct competitor in terms of business management content, the fact that it has not gone forward may increase the pool of potential recruits to our proposed program.

### 3.6 Learner Pathways

#### 3.6.1 *Identify potential pathways from work to school (where applicable).*

As indicated in section 2.2, there is a documented need for increased management capacity in Canada's apparel industry. The FBM degree program offers an opportunity for fashion professionals with limited academic training to upgrade their skills and knowledge without going outside the province. The FBM program, therefore, may be appealing to professionals currently in the workforce as well as to high school students.

As seen in the work.alberta.ca youth labour profile data (2014), the largest number of youth were employed in the retail trade - some 70,300 people. This program will provide a perfect opportunity to pursue post secondary education that builds on their already established retail interests and experience (<http://work.alberta.ca/documents/labour-profile-youth.pdf>).

#### 3.6.2 *Identify potential opportunities for transfer/laddering into the proposed program from other institutions or other programs within the institution; and for transfer/laddering from the proposed program to other programs within the institution or at other institutions. List any formal agreements for internal or inter-institutional transfer/laddering that have been negotiated to this point.*

##### **Transfer from other institutions**

Due to recent revisions in the fashion-related programming at both Olds College and Lethbridge College no transfer agreements currently exist between the Department of Human Ecology and these institutions. Agreements have existed in the past, however, so could be considered again.

The CTMC major currently considers transfer credit on a case-by-case basis from Olds College, Lethbridge College and ACAD. The same will apply to the FBM program. Transfer credit is commonly granted for introductory level english, social science, and economics courses as well as introductory level textile science, apparel design, and costume history courses. Transfer credit on business-related courses will also be considered from many institutions within Alberta.

##### **Transfer from within the University of Alberta**

Because the FBM program requires students to complete a pre-professional year of study prior to being admitted, it is likely that students who apply will have coursework that is transferable. A list of suggested courses for the pre-professional year can be found in Appendix 1. Logical faculties in which students can begin their FBM program studies are Arts, Science, and ALES (CTMC major in particular within the BSc Human Ecology program).

##### **Transfer to other institutions within Alberta**

If students enrolled in the FBM program choose to change direction and specialise in apparel design and production they should be able to present some of their coursework for transfer credit at Lethbridge College or Olds College. They could also switch into the CTMC major and receive significant credit if they selected the fashion merchandising minor, especially if they transferred before completing their third year of study. Students may also be able to transfer into the School of Business to complete a B.Comm. degree.

**Transfer to institutions outside Alberta**

Courses within the FBM program may be transferable to institutions in British Columbia and Ontario, should a student want or need to move away from Edmonton.

3.6.3 Estimate the *portion of graduates who can be expected to proceed to further education directly. At a later stage in their careers. What types of programs/credentials would they be most likely to pursue?*

The FBM degree program will prepare graduates well for managerial level work in the fashion apparel and retail industries. Some graduates, however, may want to further specialize their training by doing an after-degree certificate in human resources or accounting, for example, or by continuing on to graduate work in textile and apparel science, material culture, business or law. Based on the percentage of students who pursue further studies after completing the CTMC degree it could be estimated that 10% of students in the FBM program would proceed to further study.

## SECTION 4: FINANCIAL VIABILITY AND SUSTAINABILITY

### 4.1 Annual Budget and Funding Sources

As the proposed FBM degree program is simply a new application of existing resources, there are no additional resources required to offer this new program. The program scale is well within the capacity and resources of ALES and the School of Business to implement and sustain. No start-up or incremental operational costs are expected and enrolment will be managed so that the capacity to offer a high quality learning experience for students is maintained. The addition of 5-7 students per year in required courses may add to admissions, advising, and instructional workloads, but not significantly so.

*Identify annual and one-time expenditures and annual revenue for the program in the budget tables below. If program implementation will take place over more than one year, provide estimates for each year until full implementation. Provide explanatory notes for all budget assumptions, such as inflation and per student tuition.*

*(For proposals without significant impacts on institutional costs, revenues or enrolment, a detailed budget presentation will not normally be required (please confirm with the department). Such proposals will satisfy all of the following tests:*

- 1. The proposal is for a new specialization in an existing program, consisting of an innovative combination of existing curricula.*
- 2. Overall enrolment capacity in the program is maintained.*
- 3. Excepting incidental administrative and promotional costs, no start-up or incremental operations costs are incurred.)*

	Year 1	Year 2	Year 3	Year 4	Year 5	Annual Ongoing
<b>Revenue</b>						
Tuition and Related Fees	\$0	\$0	\$0	\$0	\$0	\$0
Re-allocation from Existing Programs	\$0	\$0	\$0	\$0	\$0	\$0
Other Internal Sources <sup>2</sup>	\$0	\$0	\$0	\$0	\$0	\$0
External (Third Party) Sources <sup>3</sup>	\$0	\$0	\$0	\$0	\$0	\$0
GOA (Identify source) <sup>4</sup>	\$0	\$0	\$0	\$0	\$0	\$0
Other (specify)	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total Revenue</b>	\$0	\$0	\$0	\$0	\$0	\$0
<b>Operational Costs</b>						
Salaries, Wages and Benefits	\$0	\$0	\$0	\$0	\$0	\$0
Materials and Contracted Services	\$0	\$0	\$0	\$0	\$0	\$0
Other Direct Costs	\$0	\$0	\$0	\$0	\$0	\$0
Indirect Costs	\$0	\$0	\$0	\$0	\$0	\$0
<b>Total Operational Costs</b>	\$0	\$0	\$0	\$0	\$0	\$0

**Notes:**

1. *Financial resources reallocated from existing programs of instruction should be estimated based on the recent cost experience of the source program(s).*
2. *Identify the source and duration of internal funding.*
3. *Identify the source and duration of external funding and outline any terms, conditions, and deliverables associated with the funding. External (Third Party) Sources might include support from other levels of government; e.g., the Government of Canada.*
4. *Government of Alberta sources might include future Advanced Education and Technology grant support or commitments (assumed or actual) from other departments.*

<b>One-time expenditures</b>	<b>Amount</b>	<b>Revenue Source</b>	<b>Details</b>
Facilities	\$		
Equipment and IT	\$		
Curriculum Development	\$		
Marketing and Promotion	\$		
Faculty Recruitment and Establishment	\$		
Library Enhancements	\$		
Other	\$		

## 4.2 Impact

### 4.2.1 Compare the proposed tuition rate with that of similar programs in Campus Alberta.

The Fashion Business Management (FBM) four-year degree program includes approximately 15 courses taken through the School of Business in addition to 5 terms of coursework in ALES. School of Business tuition includes a market modifier so the tuition for business courses is higher than it is for other courses in the program. The tuition calculation below is based on 2015-2016 rates for full-time status plus the assumption that 1.5 years of coursework incorporates a market modifier on course fees.

- 5 terms (2.5 years) in ALES @ \$3,601.90/term = \$18,009.50 + 3 terms (1.5 years) in Business @ \$4,466.92/term = \$13,400.76. Modest additional materials costs are also expected for the two required design courses (approximately \$500.00). Total = \$31,910.26  
<http://www.registraroffice.ualberta.ca/en/Costs-Tuition-Fees/Undergraduate-Tuition/FallWinter-Tuition-for-Canadian-Citizens-and-Permanent-Residents/Sample-FallWinter-Assessments-for-Canadian-Students.aspx#business> (retrieved July 29, 2015)

The Bachelor of Design program at ACAD is a four year degree program. Tuition calculations are based on 2015-2016 rates.

- 4 years @ \$5,482.55/year (basic tuition) + \$3,340.00/year (materials costs) = \$35,290.20  
[http://www.acad.ca/assets/pdf/students/tuition/ACAD\\_Tuition\\_and\\_Student\\_Fees.pdf](http://www.acad.ca/assets/pdf/students/tuition/ACAD_Tuition_and_Student_Fees.pdf) (retrieved July 29, 2015)

The Apparel Technology Diploma program at Olds College is a two year program. Tuition calculations are based on 2015-2016 rates for overall fees plus supplies.

- First year @ \$7, 113.5 (tuition and materials + second year @ \$6,208.15 (tuition and materials) = \$13,321.65  
<http://www.oldscollege.ca/student-services/financial/tuition-fees/index> (retrieved July 29, 2015)

The Fashion Design and Sustainable Production Diploma at Lethbridge College is a two year program. Tuition calculations are based on 2015- 2016 rates for total tuition, fees, books and supplies..

- First year @ \$9,375.00 + second year @ \$8,725.00 = \$18,100.00  
<http://www.lethbridgecollege.ca/sites/default/files/imce/program-fees-15-16.pdf> (retrieved July 29, 2015)

### 4.2.2 Discuss the financial impact on students and the learner funding system, taking into account the costs of education and the potential debt burden relative to post-graduation earning capacity.

Increasingly, degrees are sought after for entry-level fashion retail jobs. Degrees are even more necessary for positions with larger employers and greater strategic and financial/budget responsibilities. The FBM degree program prepares graduates for these higher-responsibility positions. As such, the potential earning capacity for FBM graduates is higher than for graduates of fashion design and merchandising programs. For example, on average in Calgary, a Supply Chain Analyst earns \$49,803 and a Buyer earns \$48,421. In comparison, a Merchandising Assistant in Calgary earns \$37,268 and a Retail Sales Associate earns \$26,171. The higher earning capacity of FBM graduates suggests they are likely to pay off student loans faster than graduates of other fashion-related programs.

(source for income figures: <http://talentegg.ca/incubator/2013/03/21/average-entry-level-early-career-salaries-retail-jobs/>).

*4.2.3 If program funding includes internal reallocation, evaluate the impact of this reallocation on the institution's operations and overall financial position.*

N/A

**RECOMMENDATION (FOR DEPARTMENT USE)**

**Do Any Issues or Information Gaps Remain?**

**Recommendation(s)**

**Reviewer(s)**

**Date Completed**

## Part B: Campus Alberta Quality Council Review

As noted at the beginning of Part A, given a positive outcome from the System Coordination Review, the Minister may refer the proposed program to the Campus Alberta Quality Council for quality assessment, the second stage of review.

The onus is on the applicant institution to satisfy Council that the level of learning to be achieved is consistent with that which is expected at the proposed degree level, that the program has sufficient breadth and rigour to meet national and international standards as outlined in, for example, the Canadian Degree Qualifications Framework (CDQF), and that the program is comparable in quality to similar programs (if any) offered in Alberta and elsewhere. The program proposal should demonstrate how Council's program quality standards and any applicable guidelines have been addressed and describe any unique dimensions that set the program apart from similar programs thus providing new educational opportunities for students.

NOTE: Part A of the program proposal may undergo changes as a result of the System Coordination Review. It is important that Part A be up-to-date and complete before it is forwarded to Council. Building on the information provided in Part A, the program proposal that is sent to Council should contain the following additional information. When possible, links to existing policy documents and institutional policies should be provided, rather than recopying them in response to questions.

### SECTION 5: PROGRAM SPECIFICS

#### 5.1 Program Structure and Learning Outcomes

5.1.1 *Describe the program's learning outcomes and how they were established. How will the achievement of the learning outcomes be evaluated? Providing a mapping of the courses to the learning outcomes, particularly in professional programs, is helpful.*

The BSc in Fashion Business Management (FBM) degree program draws on the structure, resources, and learning outcomes of existing undergraduate degree programs in the Faculty of ALES and the School of Business. The learning outcomes for the FBM program, therefore, are broadly consistent with the criteria listed for Bachelor degrees in the Canadian Degree Qualifications Framework (CDQF).

The specific learning outcomes of the FBM degree program, as outlined in the chart below, combine an understanding of marketing and management principles with knowledge of the theoretical and practical processes involved in fashion production, distribution, and consumption. Market demands, stakeholder input, and current resources within the faculties responsible for the delivery of the FBM program were considered when establishing the learning outcomes.



Expectations of Graduates	<b>Learning outcomes and course mapping</b> (learning outcomes include but are not limited to those below)
Depth & Breadth of Knowledge	<ul style="list-style-type: none"> <li>● have a sound understanding of the psychological, social, cultural, and economic forces that inform fashion/dress (ECON 101, 102, 281; HECOL 201, 360, 333);</li> <li>● understand fashion history and its relevance to contemporary design and merchandising (HECOL 268, 360);</li> <li>● be knowledgeable about fiber and fabric properties (HECOL 170, 270);</li> <li>● understand design methods and processes as applied to the development of textile and apparel products (HECOL 254, 333);</li> <li>● have a sound understanding of the interrelationships between the various sectors involved in the design, production and distribution of fashion products (HECOL 241, 441; MARK 468);</li> <li>● be familiar with global trade and policy environments for the textile and apparel complex (HECOL 441);</li> <li>● have a sound understanding of consumer behaviour and customer decision making (MARK 320)</li> <li>● understand theories of sustainable development and consumption in a global environment (HECOL 441);</li> <li>● are aware of ethical issues pertaining to the production, consumption, and marketing of material goods (HECOL 201, 241, 441, MARK 301);</li> <li>● understand business and corporate strategies for competitive positioning (AREC 484);</li> <li>● understand the processes involved in managing a fashion-related business (SMO 301; Acctg 311, 322; OM 352; MARK 468; ECON 378 or Blaw 301);</li> <li>● have an advanced understanding of the history, properties, design, production, evaluation, and consumption of textile and apparel products, depending on chosen course options (HECOL 354, 370, 460, 462, 464, 465, 470, 473 or 493);</li> <li>● have an advanced understanding of the marketing, buying, selling, strategic planning, and management processes related to fashion business, depending on chosen course options (SMO 311, 402, 404, 407, 412; MARK 442, 455, 466, 470).</li> </ul>
Knowledge of Research Methodologies	<ul style="list-style-type: none"> <li>● have the ability to access relevant information and evaluate its integrity and accuracy in a timely manner (all courses);</li> <li>● conduct humanities and social science-based research and artefact documentation (HECOL 201, 268, 360);</li> <li>● know how to collect and use information about the marketplace, specifically for market research, trend forecasts and environmental scans (MARK 301; Stat 151; AREC 313 or MARK 312);</li> <li>● understand deterministic and stochastic models used for production planning and operations management in business (OM 352);</li> <li>● analyze, interpret, and influence the development of standards and policies</li> </ul>

	<p>related to textile and apparel products (HECOL 370, 441);</p> <ul style="list-style-type: none"> <li>● interpret, analyze, critique, and present knowledge that contributes to the field (various courses)</li> </ul>
<p>Application of Knowledge</p>	<ul style="list-style-type: none"> <li>● have basic skills in the design, production, and costing of apparel products (HECOL 254);</li> <li>● know how to visually present design and marketing concepts for production and manufacture of apparel (HECOL 250, 254, MARK 432);</li> <li>● display entry-level skills associated with artefact-based research, curating and visual display (HECOL 250, 268, 333);</li> <li>● can relate fibre, yarn, and fabric properties to the quality and performance attributes of textile and apparel products (HECOL 170, 270, 254);</li> <li>● display an ability to integrate the components of a marketing mix to solve marketing problems (MARK 432, AREC 484);</li> <li>● know how to prepare and interpret financial statements (ACCTG 311);</li> <li>● know how to prepare and use accounting information for management decision making (ACCTG 322);</li> <li>● have the ability to create business and strategic management plans (AREC 423);</li> <li>● display an ability to integrate economic and business management concepts to real-world problems in the industry (AREC 423).</li> <li>● possess advanced skills related to the design, production and evaluation of textile and apparel products, depending on chosen course options (HECOL 354, 370, 465, 470, 473 or 493);</li> <li>● display advanced skills in the marketing, buying, selling, strategic planning, and management processes related to fashion business, depending on chosen course options (SMO 311, 402, 404, 407, 412; MARK 442, 455, 466, 470).</li> </ul>
<p>Communication Skills</p>	<ul style="list-style-type: none"> <li>● understand the benefits and challenges of interdisciplinary teamwork and show commitment to the practice of collaboration (SMO 301, various other courses with group projects);</li> <li>● understand communication theory (ALES 204, SMO 301);</li> <li>● have an understanding of the dynamics of communication within the fashion industry, in particular related to social media (HECOL 241, MARK 432);</li> <li>● use effective written, oral, and visual communication skills in: <ul style="list-style-type: none"> <li>○ writing scholarly analyses, consumer fact sheets, position papers and policy briefs, promotional materials, critiques, blogs, newsletters and press releases;</li> <li>○ designing and developing posters and story-boards, powerpoint presentations, and advertisements; and</li> <li>○ facilitating and conducting meetings and professional presentations. (various courses)</li> </ul> </li> </ul>

5.1.2 *Students are expected to demonstrate independent scholarly activity applicable to the degree level and expectations of its graduates (see the CDQF). Describe the academic culture that will nurture and support student scholarly and creative activity.*

The CDQF document suggests that independent scholarly activity may be demonstrated through the preparation of essays, terminal research papers, projects or exhibitions which indicate the capacity for independent and ethical intellectual and creative work. Each of these types of outputs, over the course of students' degree programs, will be required, providing on-going assessment of the learners' progress.

Overall, The ALES academic culture supports achievement of learning outcomes and prepares learners to meet community, professional, and industry needs and practices and/or continue with further study through relevant curriculum development, experiential and/or international learning opportunities and assessment. This process is augmented and supported by the dissemination of new knowledge and innovation resulting from the Faculty's strong research-intensive focus. Support of student scholarly activity is enhanced through the following guiding principles characteristic of curriculum development for this degree. It will be:

- evidence-based (incorporates qualitative, quantitative and experiential research and practices)
- learner-centred
- current and relevant
- well-constructed and cohesive

5.1.3 *For undergraduate degrees, demonstrate (in a table, if possible) how the program meets the relevant section of CAQC's Expectations for Design and Structure of Undergraduate Degrees.*

1.4 *Provide an outline of the program structure and requirements (major, minor, cognates, core, general education, etc.) including credits in each category, and a summary description of the curriculum. Note any new courses. Course outlines must be available for reviewers but are NOT to be included with the proposal. (See sample table below - note that this is provided as a guideline only for a typical baccalaureate program, and will be different for other baccalaureate and graduate programs).*

### **Program structure**

The BSc Fashion Business Management (FBM) degree program combines an understanding of marketing and management principles with knowledge of the theoretical and practical processes involved in fashion production, distribution, and consumption. The program is offered jointly by the Faculty of Agricultural, Life and Environmental Sciences (ALES) and the School of Business. It will be administered in the Faculty of ALES and managed by an interdisciplinary committee with representation from both Faculties.

Prior to admission into the FBM program, students complete a pre-professional year of study that ideally includes general liberal arts courses and introductory courses in material culture, fashion and textile science (see year 1 in table below). All courses recommended for the pre-professional year are open to students in any Arts, Science, or ALES program at the University of Alberta. Many of the courses also have equivalents at other post-secondary institutions in Alberta.

After admission into the FBM program, students take a range of advanced core courses in economics, accounting, business law and ethics, marketing, operations management, human resources, product design and development, textile science, fashion industries, globalization, and international trade (see years 2-4 in table below). All students cap their degree with an integrative and applied capstone course (AREC 423) that engages them with industry partners. No new courses will be created to support the program at this point.

There is no minor within the FBM program but there are ten courses (four free electives and six approved program electives) within the program over which students have choice. Students will be advised to choose approved program electives based on career interests, and choose free electives based on career and/or personal interests.

**Program requirements (120 credits):**

Required courses (102 credits):

- \*6 ENGL
- \*3 ALES 204
- \*3 MATH 113 or 114
- \*9 ECON 101, 102, 281
- \*3 STAT 151
- \*3 AREC 313 or MARK 312
- \*6 ACCTG 311, 322
- \*3 SMO 301
- \*3 AREC 484
- \*3 OM 352
- \*3 ECON 378 or BLAW 301
- \*12 MARK 301, 320, 432, 468
- \*30 HECOL 170, 201, 241, 250, 254, 268, 270, 333, 360, 441
- \*3 Capstone (AREC 423)
- \*12 Free electives

Approved program electives (18 credits):

- \*3 SMO 311, 402, 404 or 407
- \*6 MARK 442, 455, 466, 470 or SMO 412
- \*9 HECOL 354, 370, 460, 462, 464, 465, 470, 473 or 493

**Typical program flow**

Year 1 (pre-professional study)	Year 2	Year 3	Year 4
*3 Engl	Hecol 250: Design Studies and Practice	Mark 320	Mark 468: Retail and Channel Management
*3 Engl	Econ 281: Intermediate Microeconomics	*3 Hecol chosen from HECOL 354, 370, 460, 462, 464, 465, 470, 473, 493	*3 Hecol chosen from HECOL 354, 370, 460, 462, 464, 465, 470, 473, 493

Econ 101: Introduction to Microeconomics	SMO 301: Behaviour in Organizations	Acctg 322: Introduction to Managerial Accounting	*3 OM 352: Operations Management
Hecol 201: Introduction to Material Culture	Acctg 311: Introduction to Accounting for Financial Performance	*3 Mark 442, 455, 466, 470, or SMO 412	*3 Econ 378 or Blaw 301: Common Law and Economic Incentives or Legal Foundations of the Canadian Economy
Stat 151: Introduction to Applied Statistics I	Mark 301: Introduction to Marketing	*3 SMO 311, 402, 404, or 407	Mark 432: Marketing Communications
Math 113 or 114: Elementary Calculus I	Hecol 268: Survey of Historic Dress	Hecol 360: Dress and Culture	Hecol 441: Textiles and Apparel in the Global Economy
Hecol 170: Introduction to Textiles	Hecol 254: Apparel Design and Construction Fundamentals	*Arec 313 or Mark 312: Agriculture and Resource Economics or Marketing Research	*3 Mark 442, 455, 466, 470, or SMO 412
Econ 102: Introduction to Macroeconomics	ALES 204: Communication Theory and Practice	Hecol 333: Cross Cultural Textiles	Arec 484: Strategic Management in Food and Resource Businesses
HECOL 241: Fashion Industries	Hecol 270: Applications of Textile Science	*3 Hecol chosen from HECOL 354, 370, 460, 462, 464, 465, 470, 473, 493	Arec 423 (capstone)
Free Elective	Free Elective	Free Elective	Free Elective

## 5.2 Criteria / Requirements for Admission and Academic Progression

*State the admission criteria (including any provision for prior learning assessment), residency requirements, academic performance progression requirements, and graduation requirements applicable to the program, along with the grading scheme. Note any program specific regulations (e.g., for doctoral programs, note any candidacy or dissertation requirements, examination requirements, time to completion requirements, etc.).*

### **Admission requirements:**

Admission into the FBM program will normally take place after at least one year of university (or equivalent) pre-professional study. Admission is competitive and meeting the minimum grade point average and course requirements does not guarantee admission to the program. All applicants must present a minimum admission grade point average of 2.7 on the last \*24 of University transferable

work. Because certain core requirements have high school pre-requisites students must also show that they have successfully completed Pure Math 30 or Math 30-1 in high school.

Once admitted to the FBM program, the records of all students will be reviewed once per year. Academic standing is determined by a student's performance over the period under review. Consistent with University of Alberta policies:

- (1) **First-Class Standing:** Awarded to a student who obtains a grade point average of 3.5 or above while enrolled in a full, normal, academic course load in that year; the definition of a full normal academic course load for the FBM program will be determined by the Faculty of ALES.
- (2) **Satisfactory Standing:** Awarded to a student who obtains a grade point average of 2.0 or above and normally indicates that the student is eligible to continue.
- (3) **Marginal Standing:** Given to a student who obtains a grade point average of 1.7 to 1.9. Students with marginal standing may be permitted to continue under academic warning. Students in the FBM program may be required to withdraw and/or repeat the entire year if their standing is marginal.
- (4) **Unsatisfactory Standing:** Normally given to a student who obtains a grade point average of 1.6 or below. Students whose records are found to be unsatisfactory will be notified by the Dean of ALES and they will normally be required to withdraw.

### 5.3 Engaged and Active Learning / Delivery Methods

5.3.1 *Demonstrate the ways in which the institution identifies and attends to the learning of students in the program and what pedagogies will be used to encourage their engaged and active learning, as per Council's program quality assessment standard #5 (Program delivery).*

At the institutional level, the University of Alberta broadly describes its commitment to student learning within a framework of four major goals: to inspire outstanding research and learning, to transform open minds, to encourage achievement through exposure to world class experts and to uplift through creating opportunities to engage with with local and global communities.

One aspect of working within this framework for the FBM degree program is that the qualification of an academic staff member offering instruction will usually be a doctoral degree in the discipline in which the staff member is assigned to teach. The minimum qualification for each academic staff member offering instruction in the program will be a Master's degree or equivalent in the discipline in which the staff member is assigned to teach. FBM program instructors will be respected scholars and researchers.

Another aspect of working in this framework is the engaged and active learning included in various courses required in the FBM program. For example, many human ecology (HECOL) courses are laboratory, studio and seminar courses that involve hands-on and project-based learning. Another example is the capstone course (AREC 423) that involves students working with industry partners to solve actual problems in the field. Finally, students will be encouraged to participate in the co-op program offered through the School of Business. Through this program students will be able to access local, national, and international experiential work opportunities in fashion business.

5.3.2 *Include a description of the teaching/learning approaches to be used, a description of the rationale for using the approach and evidence of adequate support for the approach. Where*

*applicable, demonstrate how CAQC's Additional Quality Assessment Standards for Programs Delivered in Blended, Distributed or Distance Modes will be met.*

The many qualified instructors delivering the courses required in the FBM program will employ teaching/learning techniques they believe are appropriate for the subject matter. A wide range of teaching/learning approaches - including lectures, seminars, and courses with laboratory and studio time - are expected to be used in the delivery of the FBM program.

High levels of scholarship will also be employed throughout the FBM program. All of the existing programs that the proposed FBM program draws from – the BSc Human Ecology, BCom, BSc in Forest Business Management, and BSc in Food Business Management - currently integrate research, scholarly work, and teaching through offering advanced, 300- and 400-level program requirements and electives. The content of these courses typically matches the research and expertise of the instructor and thus integrates research, scholarly work, and teaching. Most 400-level courses in these current programs also encourage undergraduate research by integrating independent research, student presentations, or other elements of experiential learning in course assignments.

Blended learning may be utilized for some of the courses and the Faculty of ALES has a dedicated staff person available to assist instructors in developing blended learning approaches for their courses. The University also has a Centre for Teaching and Learning (CTL) that offers teaching support and guidance to all instructors as they develop and evolve their courses.

At this point the FBM program will not be offered in distributed or distance modes but, depending on student interest and available resources, some courses may be offered in online format in the future in order to facilitate part-time study and ease of transfer into the FBM program.

## **5.4 Program Comparison**

5.4.1 *Provide a comparative analysis of the proposed program (curriculum, structure, admission requirements, etc.) with similar programs offered elsewhere (if any), especially in Alberta and Canada (see sample table below). What process was used to determine which programs were deemed to be the most comparable? Illustrate the similarities and differences.*

We reviewed post-secondary programs related to fashion, retailing, and fashion marketing/business offered by institutions in Alberta, British Columbia, and Ontario. These comparative programs were chosen based on focus, proximity, language of instruction, and reputation.

Within Alberta there are three other post-secondary programs that offer fashion-related programming, as well as two University of Alberta BComm programs related to marketing, retailing, and business operations. These programs are noteworthy because of proximity and focus.

1. Olds College, in Olds, Alberta, offers an eight-month Fashion Marketing Certificate in which students learn about marketing, displaying and selling fashion products, and a two-year Apparel Technology Diploma that focuses on apparel design and construction. Applicants to both the fashion marketing certificate and apparel technology diploma must have: 50% or better in English Language Arts 30-1 or 30-2 and 50% or better in Math 20-1 or 20-2 (Pure or Applied Math 20) <http://www.oldscollege.ca/programs/fashion/apparel-technology/admission-requirements/index>

2. Lethbridge College, in Lethbridge, Alberta, offers a Diploma in Fashion Design and Sustainable Production. The two-year program provides an introduction to sustainability in the apparel industry and focuses on the design and production side of the fashion industry. Students in this diploma program may be able to transfer into the Bachelor of Management program at the University of Lethbridge but a direct transfer agreement does not exist. Admission to the diploma in Fashion Design and Sustainable Productions requires the successful completion of a high school diploma. <http://www.lethbridgecollege.ca/admissions/overview>
3. The Alberta College of Art and Design (ACAD) in Calgary, Alberta, offers a Bachelor of Design degree program that prepares students for careers in photography and design. Although the program does not specifically focus on fashion, there are course options in fibre arts, visual communication and design, material culture, advertising, jewelry design and construction, drawing, and art history. Applicants to the Bachelor of Design degree program must possess a High School Diploma with a combined GPA of at least 60% in four grade 12 subjects, including a 30-level English. There is also a specific portfolio requirement. <https://acad.ca/future-students/how-apply-bachelors-degree/academic-requirements>
4. The School of Business at the University of Alberta offers a four year Bachelor of Commerce degree that gives students the option of majoring in Marketing or Retailing and Services. Both routes include coursework in marketing and business management although the focus is not specific to fashion. The BCom program is a quota program and admission is competitive. Applicants must present a minimum GPA of 2.3 on \*24 University transferable credits that include \*6 English and a maximum of \*3 in WRS, ECON 101, ECON 102, Math 113 or 114, and STAT 151. <https://business.ualberta.ca/programs/bachelor-of-commerce/prospective-students>

Outside Alberta there are various diploma, certificate, and degree programs with either a fashion design, fashion business, or retailing focus. The most comparable program in terms of content is the B.Comm. in fashion management at Humber College. The programs offered at Kwantlen Polytechnic University in British Columbia are noteworthy because of Kwantlen's proximity, and the programs at Ryerson University are noteworthy because of Ryerson's reputation in the fashion industry.

1. Bachelor of Commerce in Fashion Management at Humber College in Toronto - a four year degree program composed of business and management courses tailored specifically for positions within the fashion industry including marketing, accounting, economics, and law.

2. Bachelor of Design, Fashion, and Technology at Kwantlen Polytechnic University in Surrey, British Columbia - a four year degree program designed to help students master the process, skills and language of fashion design from concept through production. The program prepares students for careers in the global apparel industry, with most graduates in leadership roles, technical specialties and management positions.



3. Fashion Marketing Diploma at Kwantlen Polytechnic University in Surrey, B.C. - a two year diploma that integrates studies in fashion, communications, business, and marketing to prepare students for work in the creative business services sector.
4. Bachelor of Design in Fashion at Ryerson University in Toronto - a four year degree program that delivers professional, career oriented education within the scope of fashion design or fashion communication, depending on the student's chosen stream.
5. Bachelor of Commerce in Retail Management at Ryerson University in Toronto - a four year degree program posited as professional, career oriented education within the retail sector and related industries; particular focus is given to consumer behavior, drivers of the demand chain, and the contexts of retailing in society.
6. Diploma in Fashion Business at Seneca College in Toronto - a two-year diploma with a focus on lab and theory based learning in preparation for entry into the fashion industry.
7. Diploma in Fashion Management at George Brown College in Toronto - a three year Ontario College Advanced Diploma that includes business and management courses tailored specifically for positions within the fashion industry including marketing, accounting, economics, and law.

Through the comparative analysis it was determined that the proposed Bachelor of Science in Fashion Business Management (FBM) will be the only baccalaureate program in Alberta, and all of western Canada, providing undergraduate education in the area of fashion business management. In addition, this new offering will contribute to the Campus Alberta vision by providing a program that uniquely builds on fashion-related programming currently offered at colleges and universities like Olds, Lethbridge, and ACAD. Finally, the higher admission requirements of the FBM should enhance the reputation of the program and ensure its appeal for both local and international students.

*5.4.2 If a similar program is currently offered at the institution, compare the structure, admission requirements and learning outcomes to the proposed program. If this is a conversion of an existing program (e.g., conversion of an applied degree to a new degree program), provide a table similar to the sample shown below.*

The current Clothing, Textiles and Material Culture (CTMC) major in the BSc Human Ecology degree within the Faculty of ALES is similar to the FBM program in that it is a bachelor of science program that provides an understanding of fashion-related connections across a diverse range of courses that includes textile science, material culture, economics, design, dress and culture, history of costume, and textile and apparel policy and trade. Students in the CTMC major specialize their studies to some extent by choosing a minor. The minor most related to the FBM program is Fashion Merchandising and for this minor students complete one accounting course and four marketing courses (there are restrictions on which marketing courses students can choose from).

The CTMC major differs from the FBM program however, in that the CTMC major provides a broad overview of the fashion industry with no explicit focus on the business side of the industry. Students who choose the fashion merchandising minor develop some understanding of accounting and marketing within the industry but exposure to business management content is limited compared to what it will be through the FBM program.

In terms of admission requirements, students are admitted into the CTMC major directly from high school whereas the FBM program requires students to complete a pre-professional year of post-secondary study prior to program admission. The transfer admission grade point average for the CTMC major is also lower than it is for the FBM program (2.3 for application to the CTMC program compared with 2.7 for application to the FBM program). In addition, the CTMC major is not a capped program whereas the FBM program will restrict the number of students accepted each year.

### **5.5 Other elements affecting quality**

*Note any other relevant aspects of the proposed program that might affect quality (e.g., fast-tracking, individual study, parts of the program to be offered in cooperation with another institution, etc.).*

N/A

## **SECTION 6: IMPLEMENTATION AND RESOURCES**

### **6.1 Program Implementation Plan**

*Provide a program implementation plan by academic year (start to maturity) that includes any elements to be phased in (e.g., new academic staff hires, courses, minors, co-op option). If introduction of this program is dependent on a similar program being phased out, the implementation plan should include how both programs are being supported until the phase out and start up are completed.*

Since the FBM degree program builds on existing infrastructure and program delivery mechanisms, implementation will be straightforward. Students will apply to the program and start taking classes as soon as the program is approved and listed in the university calendar.

### **6.2 Staffing Plan**

6.2.1 *Show how the number (head count and FTE), distribution and qualifications of teaching staff meet Council's requirements and the objectives of the program as a whole (as described in s. 1.6 above). Include the academic staff expertise to be recruited, if new staff are contemplated. Provide summary information of current academic staff and new hires who will be teaching in the proposed program in the following format (see sample table below).*

All course requirements within the FBM program will be delivered through existing staff and course offerings at the University of Alberta. No new positions are required at this point. Tenured and permanent academic staff with the expertise and experience to deliver the FBM include:

#### From ALES

##### *Human Ecology*

Dr. Jane Batcheller and Dr. Rachel McQueen (textile science); Dr. Anne Bissonnette (costume history); Professor Vlada Blinova (MSc; apparel design, cross-cultural textiles); Professor Lori Moran (MSc; fashion industries, global textile/apparel trade and policy); Dr. Arlene Oak and Dr. Megan Strickfaden (material culture and design studies).

##### *Resource Economics & Environmental Sociology*

Dr. Sven Anders (consumer demand, economics of retailing), Dr. Ellen Goddard (consumer behaviour, economics of cooperatives), Dr. Philippe Marcoul (industrial organization, contract theory), Dr. Vic

Adamowicz (applied econometrics, choice modelling), Dr. James Rude (policy analysis, international trade).

From the School of Business

*Accounting*

Loretta Amerongen, Sanjay Banerjee, Adam Esplin, David Cooper, Kristie Dewald, Yamin Hao, Linda Hayes, Karim Jamal, Jocelyn King, Jason Lee, Michael Maier, Erin Marshall, Christina Mashruwala, Shamin Mashruwala, Naomi Rothenberg (Leave), David Rusnacik, Florin Sabac, Trish Stringer, Ke Wang, Heather Wier, Li Xiao

*Operations Management*

Ray Hagtvedt, Dan Haight, Armann Ingolfsson, Bora Kolfal, Chris Neuman, Michele Samorani

*Marketing, Business Economics and Law*

Jennifer Argo, Robert J. Fisher, Gerald Häubl, Yu Ma, Paul Messinger, Sarah Moore, Kyle Murray, Peter Popkowski Leszczyc, John Pracejus, Kangkang Wang

*Strategic Management and Organization*

Tony Briggs, David Deephouse, Richard Field, Joel Gehman, Ian Gellatly, Bob Gephart, Vern Glaser, Timothy Hannigan, Karen Hughes, Michelle Inness, Jennifer Jennings, Andrew Luchak, Trish Reay, Yonatan Reshef, Christopher Steele, Lloyd Steier, Madeline Toubiana, Marvin Washington

6.2.2 *Include brief explanations of academic staff categories (e.g., continuing, sessional, term) and workload expectations.*

Delivery of the FBM program will be done through existing continuing academic staff (tenured professors, associate professors, assistant professors, faculty service officers, and administrative professional officers) in the Faculty of ALES and the School of Business. Some contractually appointed teaching staff may be used to cover courses when an academic staff member is on sabbatical or leave. Current staff workloads will remain the same.

6.2.3 *Provide a proposed teaching rotation that outlines the academic staff at launch and to maturity of the program (see sample table below) and shows clearly the plan for any cycling of courses. List also any non-academic staff who will teach in the program.*

Please see section 6.2.1 for a list of staff who will be delivering courses for the FBM program. Since the delivery of the FBM program is drawing on existing staff and already scheduled courses, no new teaching rotations are expected. Other than graduate students in the role of teaching assistants, and the occasional contractually appointed teaching staff, no non-academic staff will be responsible for course delivery in the FBM program.

6.2.4 *For graduate programs, provide a detailed plan to organize the academic advising, supervision and monitoring of graduate students, and state the credentials, graduate teaching experience, master's committee work/supervision and PhD supervision experience of academic staff. For doctoral programs, a summary table such as the following would be helpful.*

N/A

6.2.5 *Include CVs of core academic staff teaching in the program as well as key administrators (see CAQC's CV template). Be sure their permission has been given.*

N/A

### **6.3 Scholarly and Creative Activity**

6.3.1 *Describe what constitutes scholarship and/or creative activity for academic staff teaching in this program, and summarize the institutional expectations of academic staff with respect to scholarship and professional development as well as how these are assessed. Describe plans for supporting scholarly activities and professional development of academic staff (see Council's expectations regarding scholarship, research and creative activity in s. 3.7.3 of Council's Handbook).*

6.3.2 *For doctoral proposals, include a tabular summary of research grants held by key academic staff involved in the program, both (i) in aggregate form, and (ii) by academic staff member, years of tenure of each grant, and source and amount of the grant.*

The list of following activities constitute elements of scholarship for academic teaching in the FBM degree program:

- Independent and collaborative applied research across relevant disciplines (fashion studies, business management), using qualitative and quantitative methods
- Staying current and maintaining competency in the content and methodology in one's field and related fields
- Inquiry and reflective practice that is demonstrated in both teaching and research
- Innovation in pedagogy - staff are encouraged to take advantage of professional development provided by the the U of A's Centre for Teaching and Learning.
- Knowledge translation - important objective in the context of the Department of Human Ecology's and the Schools of Business' focus on on applied research and implications for policy development.
- Publication in peer-reviewed journals and/or creation of discipline relevant exhibitions
- Presentation at scholarly conferences.

These activities reflect the performance expectations for academic staff and performance of all academic teaching staff is reviewed annually by the relevant Department chairs and formally through the Faculty of ALES and School of Business Evaluation Committees for tenure and promotion purposes, and through the collection of student evaluations of teaching.

### **6.4 Physical and Technical Infrastructure**

*Describe the facilities, laboratory and computer equipment (as applicable) available to meet the specialized demands of the program, as well as plans to address any deficiencies in what might be required.*

N/A

## **6.5 Information Services**

*Provide an inventory and analysis of information resources to support the program (using standard library reference guides) and plans to deal with any deficiencies, and a description of student access to other information services.*

N/A

## **SECTION 7: CONSULTATION AND ASSESSMENT**

### **7.1 Program Evaluation**

*Describe the criteria and methods which will be used to ensure the ongoing quality of the program. Include mechanisms for periodic review using external evaluation. Include the expected outcomes, key performance indicators and performance targets for the program.*

The Faculty of ALES informally reviews its academic programs annually. The proposed program will be monitored and reviewed regularly by the Business Management Program Committee in the Faculty of ALES, with input from program partners in the School of Business. We also intend to solicit opinions from enrolled students after the second and fourth years of program operation so we can consider any necessary adjustments. Similarly, we will engage employers and other stakeholders periodically to ensure that our graduates meet the needs of employers.

More extensive reviews of Faculty of ALES' programs are conducted approximately every five years. In keeping with this already established process, a program review task force for the FBM program will be constituted on a five year cycle following program implementation. The Academic Coordination Committee (composed of program committee chairs and Departmental Chairs) takes the recommendation from the program review task force and recommends to the ALES Faculty Council the types of program changes that are required. After Faculty Council approval, resulting calendar changes are approved through established University mechanisms.

### **7.2 Consultation / Accreditation or Regulatory Approval**

*7.2.1 Building on s. 2.3, outline the consultation that has occurred with other institutions, organizations or agencies, including advisory bodies formed by the applicant institution to assist in program design, implementation and evaluation. This should include, where appropriate, professional associations, regulatory agencies and/or accrediting bodies, and prospective employers.*

No regulatory agencies or professional organizations and associations were consulted because accreditation is not required for employment in the fashion business roles for which this program is preparing graduates. Potential employers, however, were consulted to provide insight into the program content and design.

Many of the employers consulted expected graduates to understand both the creative and business sides of fashion. They also expected graduates to step into strategic planning and management roles within the industry. As such, the FBM program was structured to ensure that graduates covered topics including design, cultural studies, product development, international trade and policy, marketing, accounting, channel management, research, strategic planning, business management and ethics.

Graduates of the FBM program will be skilled in the majority of creative and business dimensions of fashion that employers are expecting.

7.2.2 *If the program is subject to accreditation or approval of a regulatory body, provide a description of the review process, requirements of the body and timing of the review (if in process). If possible, a chart or table may be useful to outline accreditation or regulatory approval requirements.*

N/A

7.2.3 *If not already covered in 7.2.2., indicate how graduates will meet professional or regulatory expectations.*

N/A

### **7.3 Reports of Independent Academic Experts**

*CAQC views external peer review, which can be both formative and summative, as foundational to ensuring the quality of academic programs. In order to strengthen the proposal, before the proposal is finalized, the institution should consult with one or more independent academic experts it selects from outside the institution to provide advice regarding all aspects of the program. The report(s) of these external independent academic experts should be provided, along with the institution's response to the report(s). If an institution wishes a program proposal to be exempted from the normal requirement of an assessment by an external expert, it must provide a compelling case as part of its request for a Fully Expedited Review. Short résumés of the academic experts involved and a rationale as to why they were selected should be provided (see CAQC's guidelines with respect to the selection and use of Independent Academic Experts in Appendix I of the CAQC Handbook).*

N/A - expedited review process is requested for this proposal.

## **SECTION 8: OTHER**

### **8.1 Adverse Claims or Allegations**

*Disclose any adverse claims or allegations that might affect this application or be of concern to Council.*

### **8.2 Statement of Institutional Integrity**

*Include a signed Statement of Institutional Integrity (see Council template on web site).*

### **8.3 Other documentation**

*Provide any other supporting documents such as the Graduate Program Handbook, Faculty Handbook, current calendar, cyclical review of programs policy, etc. that would add support to the applicant's case and would help reviewers (provide website links, if available).*

## Appendix 1 – Curriculum Design, Course Listings, Calendar Entries

### Curriculum design

Entrance to the proposed program will take place after one year of university (or equivalent) pre-professional studies. The chart below shows the desired course selection and flow over the full four years of study.

Year 1 (pre-professional study)	Year 2	Year 3	Year 4
*3 Engl	Hecol 250: Design Studies and Practice	Mark 320: Consumer Behaviour	Mark 468: Retail and Channel Management
*3 Engl	Econ 281: Intermediate Microeconomics	*3 Hecol chosen from HECOL 354, 370, 460, 462, 464, 465, 470, 473, 493	*3 Hecol chosen from HECOL 354, 370, 460, 462, 464, 465, 470, 473, 493
Econ 101: Introduction to Microeconomics	SMO 301: Behaviour in Organizations	Acctg 322: Introduction to Managerial Accounting	*3 OM 352: Operations Management
Hecol 201: Introduction to Material Culture	Acctg 311: Introduction to Accounting for Financial Performance	*3 Mark 442, 455, 466, 470, or SMO 412	*3 Econ 378 or Blaw 301: Common Law and Economic Incentives or Legal Foundations of the Canadian Economy
Stat 151: Introduction to Applied Statistics I	Mark 301: Introduction to Marketing	*3 SMO 311, 402, 404, or 407	Mark 432: Marketing Communications
Math 113 or 114: Elementary Calculus I	Hecol 268: Survey of Historic Dress	Hecol 360: Dress and Culture	Hecol 441: Textiles and Apparel in the Global Economy
Hecol 170: Introduction to Textiles	Hecol 254: Apparel Design and Construction Fundamentals	*Arec 313 or Mark 312: Agriculture and Resource Economics or Marketing Research	*3 Mark 442, 455, 466, 470, or SMO 412
Econ 102: Introduction to Macroeconomics	ALES 204: Communication Theory and Practice	Hecol 333: Cross Cultural Textiles	Arec 484: Strategic Management in Food and Resource Businesses
HECOL 241: Fashion Industries	Hecol 270: Applications of Textile Science	*3 Hecol chosen from HECOL 354, 370, 460, 462, 464, 465, 470, 473, 493	Arec 423 (capstone)
Free Elective	Free Elective	Free Elective	Free Elective

## **Courses:**

\*6 ENGL (any two junior English courses)

\*3 ALES 204

ALES 204 Communication Fundamentals for Professionals

Successful professionals require strong communication skills. This course focuses on interpersonal communication in professional settings, examining factors that enhance or impede communication and exploring strategies for communicating more effectively with different audiences. Students develop written, visual, and oral communication skills that help them connect with others both in and outside the organization, and convey information in positive and persuasive ways.

\*3 MATH 113 or 114

MATH 113 Elementary Calculus I

Review of analytic geometry. Differentiation of elementary, trigonometric, exponential, and logarithmic functions. Applications of the derivative. Integration. Fundamental Theorem of Calculus. Prerequisite: Pure Mathematics 30 or Mathematics 30-1 or equivalent. Students who have taken Mathematics 31 are advised to take MATH 114.

MATH 114 Elementary Calculus I

The course description is the same as for MATH 113. Prerequisites: Pure Mathematics 30 or Mathematics 30-1 or equivalent.

\*9 ECON 101, 102, 281

ECON 101 Introduction to Microeconomics

How markets and governments determine which products are produced and how income is distributed in the Canadian economy.

ECON 102 Introduction to Macroeconomics

Employment, inflation, international payments, monetary policy, and fiscal policy, all in the Canadian economy.

ECON 281 Intermediate Microeconomic Theory I

The theory of consumer behavior; theory of production and cost; price and output determination under competition, monopoly and other market structures.

\*3 STAT 151

STAT 151 Introduction to Applied Statistics I

Data collection and presentation, descriptive statistics. Probability distributions, sampling distributions and the central limit theorem. Point estimation and hypothesis testing. Correlation and regression analysis. Goodness of fit and contingency table.

\*3 AREC 313 or MARK 312

AREC 313 Statistical Analysis

Analysis of economic data relating to renewable resource sectors including agriculture, food, forestry, and the environment; collection of data, sampling methods, tests of hypotheses, index numbers, analysis of variance, regression, and correlation; time series analysis. Prerequisite: Introductory statistics course.



### MARK 312 Marketing Research

Nature and significance of marketing research. Marketing research methods, investigation and analysis of specific research problems.

### \*6 ACCTG 311, 322

#### ACCTG 311 Introduction to Accounting for Financial Performance

How to prepare and interpret financial statements that report to decision makers external to the enterprise, such as shareholders and creditors. Course includes principles and standards of balance sheet valuation, income measurement, financial disclosure and cash flow analysis that link preparation and use of such statements. Prerequisites: ECON 101 and 102.

#### ACCTG 322 Introduction to Accounting for Management Decision Making

In contrast to the external orientation of ACCTG 311, this course focuses on how to prepare and use accounting information for management decision making. Major topics include: the role of corporate goals, planning and control concepts, how costs behave and how to analyze and manage them, budgeting and performance measures. Prerequisite: ACCTG 311.

### \*3 SMO 301

#### SMO 301 Behavior in Organizations

Provides an understanding of the behavior of individuals in organizations. Draws from psychology, sociology, organization theory and covers topics such as personality, motivation, leadership, communication, conflict, and group dynamics.

### \*3 AREC 484 – note: the course will be modified to include fashion business content

#### AREC 484 Strategic Management in Food and Resource Businesses

Analysis of strategic management concepts and applications to agri-food and resource industries. The development of business and corporate strategies including competitive positioning; sustaining competitive advantage; vertical coordination and strategic alliances in value chains; corporate diversification and global business strategy. Prerequisite: One of the following: AREC 200, AREC 323, AG EC 200, AG EC 323, ECON 281, INT D 365, AREC 365 or equivalent.

### \*3 OM 352

#### OM 352 Operations Management

A problem-solving course which introduces the student to deterministic and stochastic models which are useful for production planning and operations management in business and government. Note: Students are expected to have basic familiarity with microcomputer applications.

### \*3 ECON 378 or BLAW 301

#### ECON 378 Law and Economics: Common Law and Economic Incentives

Economic implications of common law: property, contract, and tort; economic logic underlying different doctrines within the law, and illustrations of the law as an economic institution; externality, risk and deterrence, and other leading issues.

### B LAW 301 Legal Foundations of the Canadian Economy

Synoptic view of Canadian legal system, with emphasis on underlying considerations of social policy. While considering the nature, sources, philosophy, and policy objectives of the law, selected topics from the fields of tort and contract will be analyzed.

\*12 MARK 301, 320, 432, 468

#### MARK 301 Introduction to Marketing

Students are introduced to the marketing concept and the role of marketing within the overall business framework. The basic tools of marketing are introduced: market segmentation, positioning, product, price, distribution, and promotion, together with marketing research, consumer behavior, planning, and global marketing. A critical theme of the course is the need for the marketing mix to fit with the requirements of consumers, the competitive environment, company strengths, and community expectations. These issues are considered from strategic and tactical perspectives.

#### MARK 320 Consumer Behavior

The study of the factors affecting the consumer decision process. Analysis of consumer behavior models and their application to marketing decision making, with an emphasis on empirical research.

#### MARK 432 Marketing Communications

Students study basic concepts of interpersonal and mass communications. An emphasis on integrated marketing communications (IMC) which consist of advertising, personal selling, sales promotion, direct marketing, and public relations. A focus on integrating the elements which make up an IMC plan, resulting in a coherent communications strategy. Consumer motivation and the measurement of communication effectiveness are also examined.

#### MARK 468 Retailing and Channel Management

Students are introduced to the activities involved in retailing goods and services to consumers and to the elements that make up effective distribution channels. Retailing topics include the evolution of retailing, store location, store image, shopping behavior, retail marketing strategies and current trends in retailing management. Channel management topics include: channel structure, designing the marketing channel, channel relationships and responsibilities, selecting channel members, and physical distribution and transportation. Effective channel management, the application of marketing planning, and analysis of retailing and channel management are also examined.

\*30 HECOL 170, 201, 241, 250, 254, 268, 270, 333, 360, 441

#### HECOL 170 Introduction to Textiles

An introductory exploration of the origin, creation and use of textiles in our world. Chemical and physical properties of fibres and fabrics are introduced and an understanding of how these properties influence various clothing and textile end uses is developed.

#### HECOL 201 Material Culture

The study of a range of objects within selected time periods and environments, and the study of particular perspectives through which objects can be interpreted. Students are encouraged to understand the connection between personal, social, temporal, and cultural contexts and the objects that contribute to these contexts.

#### HECOL 241 Fashion Industries

An introduction to the soft goods industry including an overview of the apparel sector, apparel production, channels of distribution, fashion oriented products, global competitive influences, and career opportunities.

#### HECOL 250 Design Studies and Practice

Explores the production of artifacts as material culture from a human ecology perspective. Artifact production focuses on the design process including visualization, communication, inspiration/influence and interface. Students are introduced to the production of two-and three-dimensional design through historical and contemporary examples. Students also complete hands-on design projects in the studio.

#### HECOL 254 Apparel Design and Construction Fundamentals

In this studio course students develop fundamental awareness and skills for the textiles and clothing field including machine operation, design and construction terminology, pattern manipulation and fit, and quality construction techniques. Students construct samples and garments with a focus on professional standards in problem solving and production.

Prerequisites: One of HECOL 250, 170, or DES 135 or DES 138/139.

#### HECOL 268 Survey of Historic Dress in the Western World

Introduction to the historical development of dress in the Western World with contemporary applications in design, merchandising, arts performance, education and museums. Resources include the Clothing and Textiles Collection.

#### HECOL 270 Applications of Textile Science

Advancement of textile concepts introduced in HECOL 170 with an emphasis on textile finishing, colouration, care and maintenance. Techniques for fibre identification and yarn and fabric structural analysis are covered. Prerequisites: HECOL 100 and 170.

#### HECOL 333 Cross-Cultural Textiles

An introduction to the historical and technological development of cross-cultural textiles and survey of common textile-making techniques, designs, and embellishments. Ethnographic textiles are analyzed in the context of socio-cultural, political, economic, environmental, and aesthetical meanings. The course combines lectures, class discussions, videos, and examination of artifacts from the Clothing and Textiles Collection.

#### HECOL 360 Dress and Culture

The complex phenomenon of bodily adornment is explored in relationship to values, attitudes, activities, beliefs, and forms of knowledge. Clothing is considered in terms of how it is expressive of various aspects of culture. Students develop analytical skills to help them understand the role played by clothing in different times, places, and contexts. Prerequisite: HECOL 201.

#### HECOL 441 Textiles and Apparel in the Global Economy

Production and distribution of textiles and apparel in a global context; issues and policy related to international trade agreements; impact of national and international consumer, labor and environmental standards. Prerequisites: HECOL 241 and 300.

\*3 SMO 311, 402, 404, or 407 (choice depends on career focus)

#### SMO 311 HRM: Managing the Work Force in Canada

This course is a general overview of human resource management issues in organizations. It focuses on reward systems, the design of work, legal issues, union-management relationships, staffing, and training and development.

#### SMO 402 Management Skills for Supervisors and Leaders

The purpose of this course is to increase understanding of leadership roles and skill in exercising those roles. These include team building, mentoring, managing conflict, delegating, managing participative decision making, creative problem solving, and time and stress management.

#### SMO 404 Interpersonal Communication and Team Management

This course provides an understanding of interpersonal (or face-to-face) communication process and presents opportunities for personal skill development. Students should expect to engage in role play and to receive feedback on their personal style of communication. Topics include team communication, supervisory-subordinate relationships, influence and persuasion, conflict management, and performance appraisal.

#### SMO 407 Effective Team Management

Modern organizations are increasingly seeing their ability to succeed as tied to their ability to better utilize human potential for innovation and creativity, primarily through the increased use of teams and small groups. Teamwork skills are required with increasing frequency, and the ability to build high performing teams is a key management competency. This includes work teams, project teams, and virtual teams. This course will focus on the factors required to transform a group of people into a high performing team. The course will integrate theory and practical skills. Students will learn how to identify healthy and unhealthy team dynamics, and explore team development activities and interventions to improve team performance. Course topics will include: effective team communication, team building, leadership and social influence, decision making processes in teams, conflict management, motivating and teams, virtual teams, and group processes. Students will be encouraged to demonstrate practical skills as well as academic learning. Students should be prepared to contribute to role plays, case studies, class presentations, virtual group experiences, and personal style assessments.

\*6 MARK 442, 455, 466, 470 or SMO 412 (choice depends on career focus)

#### MARK 442 Seminar in International Marketing

Analysis of problems of international marketing; development of marketing strategies in light of world cultural, economic, geographic, legal and political factors.

#### MARK 455 Sustainability and Responsible Marketing

Marketing plays a large role in and is affected by corporate social responsibility (CSR) and sustainability issues. This course will explore, examine and inform how the marketing function of business activity engages in CSR and sustainability issues. Specific topics will cover how these issues are influenced by consumer trends and how they are communicated to consumers. Marketing problems found in the non-profit, for-profit and public sectors will be examined, and responsible (and irresponsible) marketing practices will be explored.

#### MARK 466 Service Marketing

Students are introduced to the important differences between marketing tangible products and marketing services. The unique nature of services is examined and the importance of service quality to both consumer and business to business customers, is emphasized. The marketing mix variables are discussed from the service perspective. Designing a marketing mix for service, not-for-profit and government institutions poses interesting and formidable challenges which are dealt with in terms of marketing planning, implementation and control. Trade barriers

to the global marketing of services, together with other global service issues are also given attention.

#### MARK 470 Selling and Sales Management

The role of selling and management of the sales force in diverse modern business environments. Topics include sales strategies, sales force planning, organization and evaluation, recruiting, selection and training, leadership and motivation, sales forecasting quotas and types of compensation.

#### SMO 412 Effective Negotiations

This is a comprehensive study of negotiation theory and practice. A negotiation simulation is conducted to provide an understanding of how theory translates into practice.

\*9 HECOL 354, 370, 460, 462, 464, 465, 470, 473 or 493 (choice depends on career focus)

#### HECOL 354 Apparel Design and Product Development I

Principles of design and merchandising applied to apparel design and product line development. A creative problem-solving approach to the production of clothing. Prerequisite: HECOL 254.

#### HECOL 370 Quality Assurance for Textiles and Apparel

Exploration of quality assurance of textiles and apparel through materials testing. Performance of textiles relative to product standards and specifications. Prerequisite: HECOL 270.

#### HECOL 460 Nineteenth, Twentieth, and Twenty-First Century Dress in the Western World

Advanced study of Western dress from the 19<sup>th</sup> century to the present. Lectures and labs introduce students to artifactual research and the handling, storage, examination and documentation of artifacts. Resources include fashion plates, photographic archives and artifacts from the University of Alberta's Clothing and Textiles Collection..

#### HECOL 462 Material Culture in Home and Community

Framed within the context of theories in human ecology, this course investigates material culture ranging from individual artifacts to community, including local and global environments. The roles and effects of material culture on individual, familial and community living are explored through literature, artifacts and life-stories. These issues are examined through a combination of seminars and group work culminating in an exhibit. Prerequisite: HECOL 201.

#### HECOL 464 Fashion and Material Culture: Politics, Economies, Societies, c. 1600-1900

Examines the evolution and practice of fashion as a social, economic, political and cultural phenomenon from a cross-cultural perspective.

#### HECOL 465 Material Culture, Identities, and Interpretations

Examines the relationship between objects and persons in a range of near environments, and considers how objects may be interpreted through specific social theories.

#### HECOL 470 Topics in Advanced Textile and Apparel Science

Advanced topics in functional textiles and clothing are examined, with an emphasis on current research and relevant theories and mechanisms.

### HECOL 473 Clothing and Materials for Sport and Safety

A human ecological exploration of the selection, use and performance of clothing and materials used for workplace safety protection and sporting/recreational activities.

### HECOL 493 Selected Topics in Textiles and Clothing

Normally offered in Spring or Summer. Can be taken for credit more than once if the topics are different.

\*3 Capstone (AREC 423) – note: the course will be modified to include fashion business content  
AREC 423 Advanced Management Methods and Applications for Agri-Food, Environmental and Forestry Businesses

Empirical applications of management and research methods used by business managers. Emphasis is given to integrating economic and business management concepts with applications to problems and issues in agriculture, food, the environment and forestry.

\*12 Free electives

## **Calendar entries:**

### 16 Admission Requirements by Faculty

#### 16.1.6 BSc in Fashion Business Management

Entrance to this program is competitive and normally takes place after one year of university (or equivalent) preprofessional studies. The minimum entrance requirement is successful completion of \*24 transferable to the university of Alberta. The minimum grade point average is 2.7 (refer to 14.2.1).

Students may prepare for the BSc in Fashion Business management by completing their first year in the Faculty of Agricultural, Life, and Environmental Sciences or in another Faculty or post-secondary institution.

Students interested in Fashion Business Management may begin in the BSc in Human Ecology program. Recommended first year courses are \*6 ENGL, \*3 ECON 101, \*3 ECON 102, \*3 STAT 151, \*3 MATH 113 or 114, \*3 HECOL 170, \*3 HECOL 201, \*3 HECOL 241, and \*3 free elective.

There are no high school entrance requirements for the BSc in Fashion Business Management. However, some required courses have high school prerequisites. Students are expected to make up any deficiencies before admission to the program. These courses include Pure Mathematics 30 or Mathematics 30-1.

### 34 Programs of Study

#### 34.11 BSc in Fashion Business Management

##### 34.11.1 General Information

The contemporary world of fashion moves faster and reaches more people than ever before and, most important, has become more business-oriented. The Fashion Business Management program was designed with this in mind, to enable students to develop the knowledge required to follow a rewarding business career within the fashion industry. Graduates develop marketing and management understanding applied to the fashion sector combined with basic knowledge of the theoretical and practical processes involved in the global textiles and apparel fashion supply chain.

The program is offered jointly by the Faculty of Agricultural, Life and Environmental Sciences and the Faculty of Business. It is administered in the Faculty of Agricultural, Life and Environmental Sciences and managed by an interdisciplinary committee with representation from both Faculties. See §16.1.6 for admission information.

This program is aimed at students who desire to gain specialized fashion knowledge and skills in combination with business, marketing and management understanding that is relevant to the international fashion industry. From human resources to an understanding of global issues and organizational and leadership techniques, to exploring the physical, socio-behavioural, and economic relationships involved in the production, distribution, and consumption of textile and apparel products and services, this major develops graduates with the analytical, planning and management tools, leadership skills and ethical values required of business professionals working within the fashion industries. Graduates of this program are uniquely positioned to pursue careers in fashion management, marketing and sales, buying, production, or research and policy.

Students choosing Fashion Business Management take courses in business including accounting, business law, marketing and human resources as well as courses in design, product development, textile science, and international trade. Each student in the program is also expected, through a Capstone course, to integrate knowledge from textile and apparel sciences with the business management disciplines.

**Requirements:**

(120 credits)

- \*6 ENGL
- \*3 ALES 204
- \*3 MATH 113 or 114
- \*9 ECON 101, 102, 281
- \*3 STAT 151
- \*3 AREC 313 or MARK 312
- \*6 ACCTG 311, 322
- \*3 SMO 301
- \*3 AREC 484
- \*3 OM 352
- \*3 ECON 378 or BLAW 301
- \*12 MARK 301, 320, 432, 468
- \*30 HECOL 170, 201, 241, 250, 254, 268, 270, 333, 360, 441
- \*3 SMO 311, 402, 404, or 407
- \*6 MARK 442, 455, 466, 470 or SMO 412
- \*9 HECOL 354, 370, 460, 462, 464, 465, 470, 473 or 493
- \*3 Capstone (AREC 423)
- \*12 Free electives

## Appendix 2 – Employer Responses

Employer perspective was solicited by Prof. Kathryn Chandler posing the following question via e-mail:

*I could use your opinion on something. We are proposing a new degree program: Fashion Business Management. As a successful fashion retailer and field supervisor for our fashion merchandising practicum students, I'd love your thoughts on what we're proposing.*

*We're partnering with the School of Business to offer the degree, which will be a 4-year Bachelor of Science degree. Students in the program will take junior and senior-level courses in economics, accounting, business law, marketing, operations management, and human resources, as well as courses in design, product development, dress and culture, textile science, fashion industries, and international trade. With this degree we hope to develop graduates with the analytical, planning and management tools, leadership skills and ethical values required of business professionals working within the fashion industries. We expect the graduates to be uniquely positioned for careers in retail management, marketing and sales, buying, production, channel management, and policy analysis.*

*Given your experience in the fashion industry, can you see the training provided by this degree being of benefit to the industry? Would it help fill any current gaps in training that you're seeing, or help propel future growth in the industry? If you hired graduates of this degree what skills/knowledge would you most expect them to have?*

### **Floc Boutique, 10106 124 St NW, Edmonton, AB T5N 1P6**

April 25, 2014

I think this is a great degree. Many friends of mine etc have had to go to London England or New York to get a similar degree--think their degree was called Fashion Merchandising Degree. I think this better sets up a student with skills and knowledge for the work environment they would go into. Also at the end of the day it is a business and I don't find many students come out of university with that kind of thinking. The skills we would like them to have is understanding buying process, target markets, sales forecasts , open to buys, relationship between product development and sales plans. Hope that helps.

### **Derks, 8111 102 St NW, Edmonton, AB T6E 4A4**

April 24, 2014

This would be awesome....the biggest challenge we have to overcome as retailers is finding people that understand the economics, accounting (open to buy) turns, as well as understanding the technical components of fashion with fit, style, production values....so many people just like the fashion and marketing components but there is so much more than that to the successful operation of a retail business...it is a constant challenge and cost for a retailer to bring someone up to the level you need to operate successfully. We use the Harry Friedman system, the Management One system plus a lot of in house tools to bring our staff up to the level we need....hope this helps.

### **Thread Hill, 10725 124 St NW, Edmonton, AB T5M 0H1**

April 30, 2014

Sorry for the delay in responding.

My thoughts on this proposed program are:

This sounds like well rounded studies with a logical business aspect that seems to be lacking in the perceptions of the younger generation today. I think often times the business side is missing and it's the most challenging side of fashion retail.

It would definitely add a reality check to students who believe it's glamorous and an easy business.

I can't see a business my size hiring anyone with this degree. A larger retailer would probably benefit especially in terms of the financial and economic courses.

What I keep finding in the industry is a disconnect between the creativity and business acumen that needs to exist. So many local designers I have met have no idea what it takes to supply.



Hope this helps.  
Best of luck with the program.

**Morris Furs, 5820 111 St NW, Edmonton, AB T6H 3G1**

August 29, 2014

I am sending you some comments regarding the new Fashion Business Program that you are working on.

My question is what will make your course more attractive to a student interested in studying Fashion Business, than any of the other Colleges that offer something similar? As well, what will be so great about this course, that I as a potential employer will make me want to hire your graduates?

I believe the program needs to attract top students interested in fashion, whether coming direct from high school or a person who may have experience from having worked in retail and want to take the program as a mature student. There are many people who start working in fashion and retail, and may not have had an opportunity to go to university until later in life and are interested in taking the program later on in their life. These individuals, though may be few and far between, I believe need to be considered, as their life skills are invaluable from my point of view.

I believe the course needs to be not only challenging but a difficult and challenging program. I believe students will value it more if it is difficult to get into and to maintain. I also strongly believe that it will produce serious and strong future employees as the fashion business is a challenging business to be a part of.

Below is a list of the skills and knowledge that I and most people I know in the fashion industry use on a daily basis.

Therefore in order to fully educate a student interested in a higher level university course for the Fashion Business, they should be taught these skills:

- Fashion business reading and writing class, including terminology of fashion
- Fashion marketing
- Computer applications for the fashion industry
- Managing merchandise-apparel & accessory product knowledge
- Ethics & sustainability
- Trend analysis & product development
- Social media, event planning, sales, fashion promotion
- Wholesale sales, importing, exporting distribution & logistics
- Sourcing
- Retail buying, store planning, merchandising, styling, global retailing, Omni channel retailing, budgeting, analysis
- Photography, internet retailing, display
- New venture development
- History of fashion and fabric, fibre & textile understanding
- Fashion occupations
- Principles of accounting, budgeting & financial planning
- Managing a sales force
- Fashion advertising-strategy, creating and buying

I believe there needs to be a class year end type project. Most Fashion Programs do a fashion show, which really is geared for designing. Possibly a year round store where each year of the program takes on more and more responsibility (ie) first years are sales staff....fourth years are actually the managers and buyers, strategists, planners? Similar to the NAIT Culinary Program. In addition to the learning process, the students are generating income to finance the business as well as having a great marketing tool for advertising the Fashion Business Program. This could possibly be a joint venture with the School of Retailing.

I understand that there will be limitations of the Fashion Business Program as it starts out as a new entity working within the structure of the University of Alberta, Agriculture. However, I strongly feel that as a University, the program needs to be a competitive strong 'real' Fashion Business program to be taken seriously by potential serious fashion students. If it is not, the best students will continue to chose FIT, Ryerson, Lasalle, George Brown and others as they already have a well established program.

Long term this should be a program that can add to it a Masters program, as there are individuals interested in such a thing.

A network of fashion industry individuals need to be used as mentors, advisors and future employers. From them you will generate additional opportunities that will help strengthen the program and help promote this program beyond Edmonton and Alberta.

I hope this gives you some information, suggestions and ideas as to what I need for future employees in our business....focussed, serious, strong, tough, smart hard working fashion knowledgeable individuals. I know, I am asking for alot. However, Western Canada is greatly missing potential employees with a Fashion Business education. Currently those students leave for Toronto and New York and they do not return. A fashion business such as ours, here in Edmonton, ends up having to start from the beginning and teach our employees ourselves, involving too much of our time and resources. My dream is to one day hire someone straight from a Fashion Program that already knows how to do most of the things I currently have to teach them to do or end up doing myself.

**FGL Sports Ltd., 824 41<sup>st</sup> Ave NE, Calgary AB, T2E 3R3**

August 5, 2014

Our Garment Quality Assurance team sees Product Development and Merchandising Management – like assortment planning and retail buying – as an asset.

Please let me know if you have additional questions, I'd be happy to take a meeting with you in person anytime to discuss additional thoughts as I feel brokering a stronger relationship with the U of A will help us net the talent we're seeking supporting our Private Label Brand vertical.

I feel it would be advantageous to set up an Internship program for Fashion Business Management in the future once this program gets rolling.....eager to discuss.

I definitely see a benefit to this program. As a retailer with a head office located in Alberta we support corporate roles in a variety of areas like the ones you mentioned including Purchasing, Allocations & Replenishment.....

# gravitypope

8220 104 Street, Edmonton, Alberta, Canada T6E 4E6  
p. 780 439 7466 ext. 102 f. 780 439 7434

Kathryn Chandler  
Practicum Coordinator  
Department of Human Ecology  
340 HEB, University of Alberta, Edmonton, AB, T6G 2N1  
780.492.0192

September 1, 2015

Dear Kathryn,

I am excited to hear about the possibility of plans to introduce a BSC in Fashion Business Management into the U of A curriculum.

I strongly believe this type of schooling is missing in Alberta and would be extremely beneficial to the fashion retail sector here. Currently, I believe there to be a void in finding a skillset that bridges fashion retail with business management.

**gravitypope** is a fashion retail chain with 7 points of sale across Canada. I started my business here in Edmonton 25 years ago. Over the years, as we grew, I often struggled to recruit good administrative staff with an appropriate skillset to aid in executive tasks of inventory analysis, merchandise management, buying, budgeting and retail accounting. I have observed a major void in this market for a strong skillset that combines fashion and business management.

Having a fashion retail head office here in Alberta has not been easy. I have often had to resort to sourcing administrative employees from the Oil and Gas sector. I can definitely say this has hindered the growth potential of my company. I have often thought of moving my entire head office to Vancouver only so I could choose from a larger pool of personnel with a comprehensive skillset in accounting and marketing combined with fashion retail. Had it not been for family ties here in Alberta, I may actually have made the move.

As my company continues to grow, I find I am always looking for employees who are interested in and able to understand business and accounting from the perspective of fashion retail. This continues to pose a problem for my business that I believe could be alleviated with such a program as you have proposed.

Currently, students with a keen interest in Fashion Business Management often choose to move elsewhere to study due to the lack of comprehensive training available here in Edmonton. Sadly, I have witnessed many times, potential employees moving away to Vancouver or Toronto. As the fashion industry continues to grow in Alberta, there is a real need to offer students comparable education to what is already offered in other schools across the country and internationally. We need to keep our

young talent here in Alberta! Edmonton is currently thriving with fresh new energy. Young entrepreneurs are opening retail shops and restaurants. We need educated employees to aid in smooth and effective growth right here in Alberta. I believe we have a much better chance of retention if we can offer them appropriate training.

Kathryn, do not hesitate to get in touch if I can further show my support in implementing this new curriculum. I strongly believe Alberta's fashion retail sector would benefit tremendously from offering such a program. I wish you much success!

Please keep in touch.

Sincerely,

A handwritten signature in black ink, appearing to read 'Louise Dirks', with a long horizontal line extending to the right.

Louise Dirks

CEO and principal buyer

**gravitypope**

p. 780 439 7466 ext 102

c. 780 975 5663

f. 780 439 7434

[www.gravitypope.com](http://www.gravitypope.com)

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## Appendix 3

### Undergraduate Fashion and Design Program Review Meeting: ACAD, Olds College, University of Alberta Department of Human Ecology

September 11, 2014

#### Attendees

ACAD	Alison Miyauchi, Mackenzie Kelly-Frere
Olds College	Tanya McDonald, Ralph Troschke, Teri McKinnon
University of Alberta	Nat Kav, Janet Fast, Kathryn Chandler, Rhonda Breitreuz, Arlene Oak, Lori Moran, Rebecca Blakey

#### Welcome and Meeting Objectives

Developing an understanding of what is happening with represented institutions' undergraduate fashion and design programming

Within the context of Campus Alberta, begin to think through areas of potential collaboration and depart with clear sense of institutional specialties

#### Introductions and Program Affiliations

##### ACAD

Alison Miyauchi	Associate Vice President, Research and Academic Affairs
Mackenzie Kelly-Frere	Associate Chair NASAD Review, Assistant Professor

##### Olds College

Tanya McDonald	Associate Vice President of Research and Learning Enterprises
Ralph Troschke	Dean, School of Agribusiness, Land & Fashion
Teri McKinnon	Manager, The Fashion Institute at Olds College

##### University of Alberta

Nat Kav	Associate Dean Academic, Professor
Janet Fast	Acting Chair, Professor
Kathryn Chandler	Former Undergraduate Program Coordinator, Practicum Program Coordinator
Rhonda Breitreuz	Undergraduate Program Coordinator, Associate Professor
Arlene Oak	Graduate Program Coordinator, Associate Professor
Lori Moran	Administrative Professional Officer, Lecturer
Rebecca Blakey	Academic Initiatives Coordinator

#### Undergraduate Program Summaries – Current and Future Directions

##### ACAD

ACAD is currently in the process of proposing a 2+2 BDes in Fashion – submitting Parts A and B to Campus Alberta Quality Council (CAQC), the ideal start date is Fall 2016

Because they are accredited with National Association for Schools of Art And Design (NASAD), will also undertake a similar process for them for planning approval – NASAD accreditation allows ACAD to process US student loans

Finalizing an MOU with Olds College regarding the management of the 2+2 BDes in Fashion, awaiting information from CAQC on how to ensure it isn't conceived of as a block transfer

Admitting first cohort of MFA in Craft Media in January 2016 – all craft media, not specific to textiles, ceramics, etc. Residencies and internships possible; are open to discussing University of Alberta as a specific resource site on this front, also a possibility in terms of elective courses, which would involve new transfer agreements. This program has already passed through CAQC

## Olds College

Two programs: a one-year certificate in Fashion Marketing and a two-year Apparel diploma.

In Fashion Marketing, are in talks with Bow Valley to possibly provide a second year option to their business program so that there's stronger management skills taught within the program

Within Apparel diploma, there are two streams: Costuming and Fashion. 26 of 54 this year have identified as interested in Costuming; ACAD and Olds will discuss the possibility of a 2+2 in Costuming in addition to the current progress on the 2+2 in Fashion.

Impetus to partner with ACAD for the 2+2 BDes in Fashion comes from attrition cases where students believe they will be doing design but the current Olds curriculum does not go far enough; had collaboration not been possible likely would have formed applied degree options. The 2+2 will be a fully integrated student experience across institutions; they are awaiting word from the government as to Fulltime Learning Equivalent (FLEs) and how to register students across institutions and will share that information once it is gleaned. Only 3 class changes need to be made.

ACAD component of the 2+2

Third year

- Critical practice and interpretive research
- English
- Design fundamentals
- Textile materials
- Design and concepts courses
- Art history
- Colour theory
- Fashion illustration
- Fundamentals of marketing and advertising
- Surface design courses
- Textiles and media
- Textile industry in global economy
- Advanced fashion design
- History of textiles
- Internship

Fourth Year

- Capstone
- Research development and design
- Fashion business and marketing
- Advanced garment construction
- Anthropology class in material culture
- Production of project
- Event planning
- Create fashion show

ACAD's capacity to teach these subjects is in some cases already extant and in other cases not. Eventually, students may flow in both directions as opposed to only starting at Olds and continuing on to ACAD.

Olds College is joining Alberta Garment Manufacturing to establish the Apparel Innovation Centre opening in January 2015. When it opens, facility will test, design and manufacture protective clothing for the energy and construction industries, as well as for the Canadian Forces. The federal government has announced it will give the facility just under \$3-million to purchase equipment. Also interested in design and construction of garments for people with disabilities. Will offer design, prototyping, small production runs

Are in process of developing fee for service schedule for individuals and groups to access equipment. Michael Bussoli serving as Manager of AIC, research management is Tanya McDonald's portfolio. Working towards three way MOU between Olds College, UAlberta, and ACAD

### **University of Alberta Department of Human Ecology**

Four year BSc degree in Clothing, Textiles, and Material Culture (CTMC) comprised of courses in English, economics, and social and physical sciences, and then specialized courses in design fundamentals, multiple levels of textile science, material culture, fashion industry, policy and international trade, professional communication, statistics and research methods, fundamentals in apparel design and construction, cross cultural dress and culture, quality assurance in labs, and a 200 hour field practicum

Within the CTMC major, students choose a minor from four options: Interiors minors take five courses through Residential Interiors program in the Faculty of Extension; Textile Science minors go further with textile science background; Design and Material Culture Studies minors do advanced courses in design and material culture; most popular minor is Fashion Merchandising which includes five business courses predominantly in marketing. Fundamentals are core and then students customize through electives that are at the advanced level. In the spring session, offer classes in special topics that might enhance core programming – sustainable design, fashion illustration, empathic design, relates to design for disabled, enrichment in intersession

Registration is about 25 students into CTMC major each year; in total there are over 100 students across the four years. Upping admission standards each cycle and suspending winter admissions because we are exceeding FLEs. Have transfer agreements with Olds College, and had agreements with Red Deer College when they had the costume program there. U of A HE does not have a portfolio requirement as part of admissions process for degree

Currently partnering with the School of Business to propose a new program, which is a Bachelor of Science in Fashion Business Management. It is about to be sent through governance for approval; an extremely optimistic start date would be fall 2016. 10 to 15 students per cohort at the most. Many components of current Human Ecology programming will be present, but focus on marketing, human resources, and leadership will increase

CAQC examines the question of unique offerings very carefully. Marilyn Patton at CAQC is an excellent resource, though at U of Alberta must inquire via Provost's office

### **Role and Impact of Campus Alberta**

From ACAD's perspective, the CA imperative does not govern how they plan, but how they execute. Helpful in thinking through what's approvable in terms of where bars of excellence are set; it's an extensive set of paperwork but there are benefits to the process. There are also CA implications in terms of government reporting such as FLEs and registrations

The Alberta Council on Articulation and Transfer has a studio based committee and Olds and UAlberta could have members on it; e-mail Alison and she will liaise with ACAT studio based subcommittee; there is a Sharepoint site with material on it and meetings are twice a year, the upcoming one is in Edmonton

Olds College simultaneously is Campus Alberta South/Central and Campus Alberta. These are different amalgamations of colleges in order to increase the access of post secondary education to rural Alberta. Rather than separately broker programs to different communities, centralized administration in order to take advantage of economies of scale

### Opportunities for Collaboration

UAlberta programming available as ELearning could be an elective option for ACAD students; vice versa as well particularly with regards to sustainability in small batch studios

Olds College, UAlberta, and ACAD all use Moodle. Excellent ELearning resource at Bow Valley College is Russ Wilde, Director of Learning Resource Services & Applied Research

### Identification of Next Steps

In terms of operating within CA, is the avoidance of overlap and duplication within CA regions or within Alberta? At ACAD, mandate is for provincial service so 75% of population is Albertan, 15% rest of Canada, 10% international. At Olds, around 70% are from an hour around Calgary. At UAlberta, 20% international, approximately 60% are Albertan, and 20% from the rest of Canada.

How do we attract mature learners with work experience? Must discuss with CA about how to recognize Prior Learning Assessment Recognition (PLAR).

Meet like this once a year or so to ensure we are not duplicating one another's work. Get representative onto ACAT Studio Committee. Continue to share experiences

Any work towards block transfer agreements between specific programs (2 years, \*60) must ensure for ACAD that coursework meets NASAD thresholds; intersession courses at UAlberta a good opportunity

### Areas of Excellence at UAlberta

- Human Ecology as a unique thought paradigm
- Collection of dress and textile artifacts
- Practicum experiences

### Areas of Excellence at ACAD

- Six hour studios
- Small faculty to student ratios
- Studios modeled on professional practice

### Areas of Excellence at Olds

- Integration with performance arts in Calgary
- Retail management

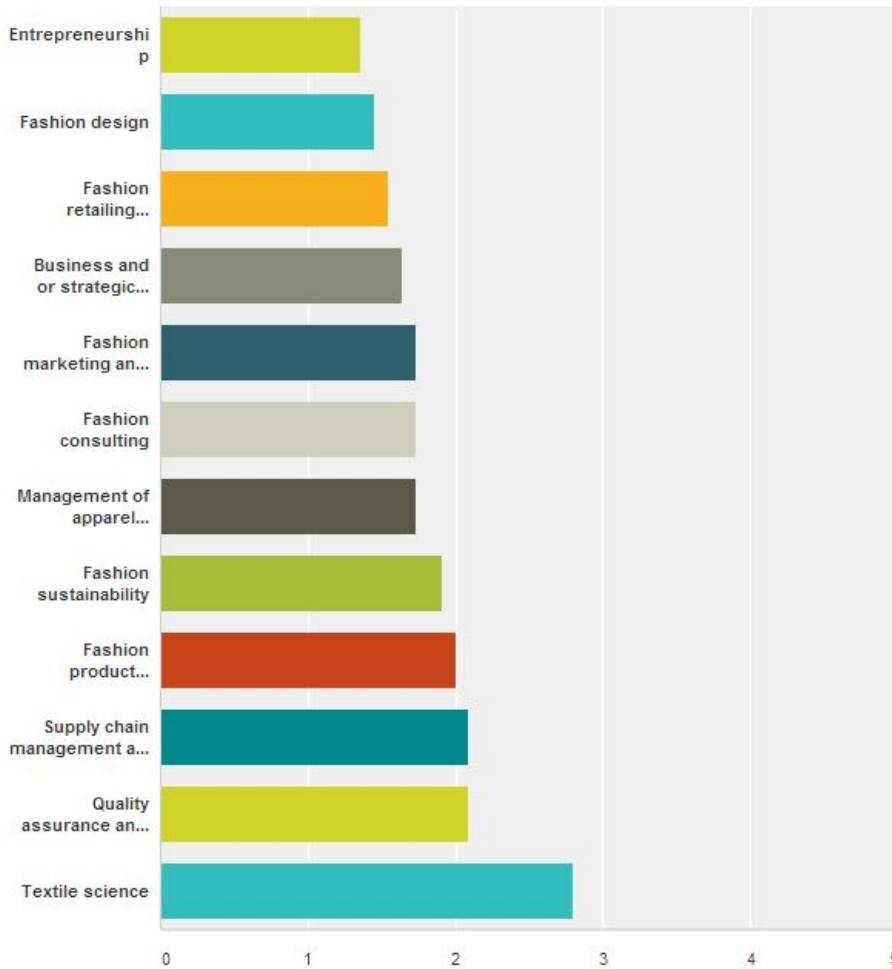
### Areas of Future Discussion

- Transfer and articulation back onto future agenda
- Be able to talk more clearly about structuring 2+2s in terms of status from Campus Alberta.
- Been appointed to CA Quality Advisory; if you have concerns let Alison be a conduit



- Continue thinking about collaborating on ELearning possibilities. Will identify potential electives and discuss how that might work in more detail

## Appendix 4 - Responses to Student Survey



**Figure 1:** Student responses to the question “Please list your level of confidence with your Clothing, Textiles and Material Culture (CTMC) program in preparing you to successfully enter the following career areas” (0=no opinion 5=very confident)

*“Become a business owner, begin a masters in architecture”*

*“To be involved in marketing cosmetics”*

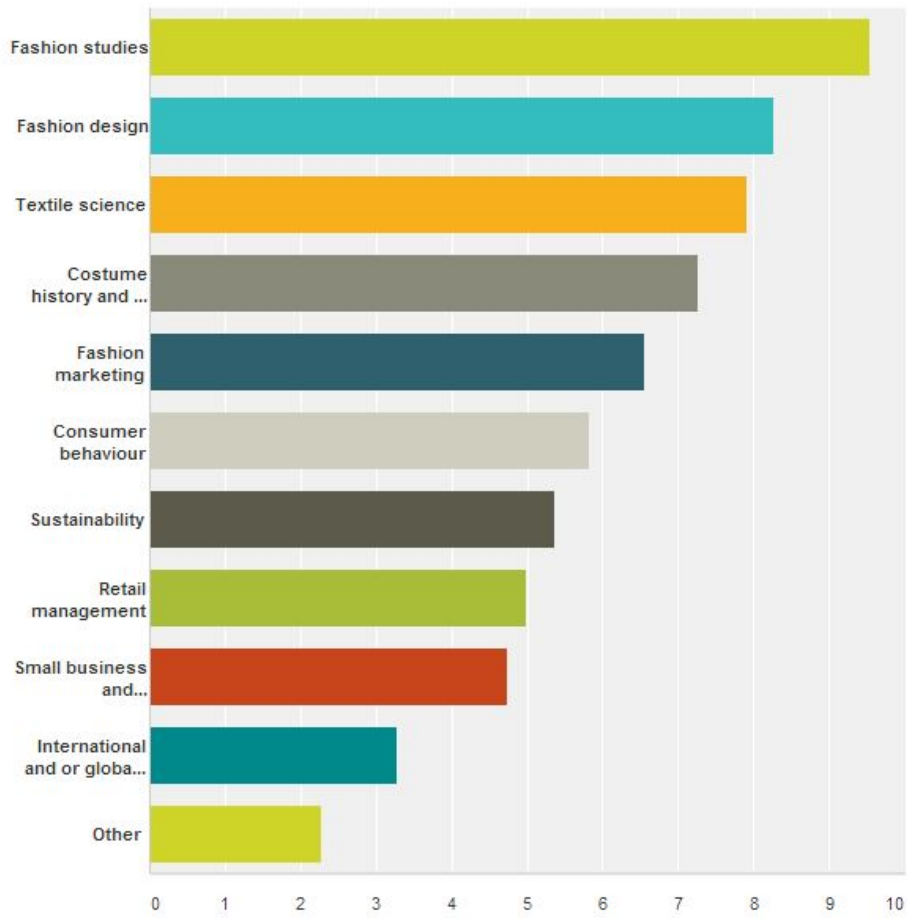
*“Personal Shopper Business Owner”*

*“Self employment and/or government”*

*“I would like to design for my own brand and begin by selling the collections on Etsy”*

*“Boutique Entrepreneur”*

**Sample responses** to the question “Do you have any specific career goals in mind at the present?”



**Figure 2:** Student responses to the question “Please rank the following areas of interest in terms of how they guided your initial selection of a post-secondary program.”

# Holt Renfrew planning \$300M store revamp

*Luxury retailer awaits arrival in Canada of Saks and Nordstrom*

PHILIPPE DE MONTIGNY  
*Financial Post*

TORONTO — As Holt Renfrew prepares for the imminent arrival in Canada of two formidable U.S. competitors, it announced Thursday that it would shut its stores in Quebec City and Ottawa, while focusing on other Canadian

designer-clothing stores, Off 5th.

Seattle-based Nordstrom is also opening its first Canadian store, next month in Calgary, with plans to open five more in Vancouver, Ottawa and Toronto by 2016.

Howard Davidowitz, a retail industry consultant based in New York, says he sees the coming of Saks as the only possible explanation for Holt's "big, bold move." Saks is a "tremendous threat" to Holt Renfrew and will target Holt's high-

end customers, Davidowitz said. "It's a direct, head-on competitor."

Holt Renfrew said it explored a "number of options for its businesses" in the Ottawa and Quebec markets, but concluded its business model relied on those locations with a "significantly larger store footprint."

A combined 157 employees will lose their jobs when the two stores close at the end of January 2015, although the company expects to increase its staff elsewhere.

The company announced it would open a Mississauga, Ont. store in early 2016 and a larger Montreal store by the end of 2017. It recently opened a new store in Toronto's Yorkdale Mall and plans to launch a second store downtown dedicated to menswear this fall. By the end of the national expansion, in 2017, the company's total footprint will reach 1.2 million square feet.

The retailer also plans to introduce an "apartment private shopping" experience at

its Vancouver and Calgary locations, where customers can browse and try products in a living-room-style environment, as well as an expanded leather-goods selection and in-store cafés. Toronto's Bloor Street location, the largest store in its network, will get a new facade and expanded beauty, accessories and footwear areas.

Holt Renfrew also has plans to develop an omnichannel digital program, which includes an e-commerce website.

# Canada's hottest job markets found in Alberta

*Opportunities across nation if you're willing move, study shows*

*Edmonton Journal*

Alberta locations dominate a new survey of Canada's hottest job markets, taking five of the top 10 spots.

Wood Buffalo tops the list of available jobs with 13.7 per cent of the population, followed by Grande Prairie in second at 11.61, Edmonton in fifth at

8.63, Red Deer eighth at 7.33 and Calgary rounds out the top 10 at 6.32.

Express Employment Professionals, the largest franchised staffing firm in North America, released its "Top 50 Hot Job Markets in Canada - Labour Day 2014" study on Wednesday.

"The provincial

unemployment rates simply don't give you an accurate picture of the job scene on the ground in Canada. This study shows there are hot job markets across the country even in provinces with high unemployment rates," said Bob Funk, CEO of Express Employment Professionals.

"The West leads the nation in terms of job markets, but you can also find areas of high demand for labour in Ontario, Quebec, New Brunswick and Newfoundland."

Regina (9.56) was in third spot and, in something of a surprise St. John's (9.49) was fourth.

There are hot job markets from seven provinces in the top 20 rankings nationwide.

Retail sales persons and sales clerks dominate as the most available types of jobs throughout the country. In Alberta, retail food services jobs are the most plentiful, while there are also many openings for truck drivers,

babysitters or nannies and light duty cleaners.

The top markets in other provinces and territories were as follows: Saint-Hyacinthe, Que. in sixth (8.52), Cambridge, Ont. in 13th (5.57), Moncton, N.B. in 15th (5.25) and Vancouver in 18th (4.77).

"In the current employment environment, eliminating the option of relocation can be a deciding factor in finding a job," Funk said.

"There is no doubt that moving is stressful, but new opportunities are available if you are open to new locations."

Express generated numbers of jobs per 1,000 population by cross-referencing a list of the 100 most populous municipalities with the average of the number of available jobs

on July 15, 2014 and Aug. 15, 2014 as identified by the federal job bank maintained by Employment and Social Development Canada.

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## Alberta leads country in retail sales growth

### Brandy Melville opens first location in Calgary at Market Mall

BY MARIO TONEGUZZI, CALGARY HERALD JULY 23, 2014

Presented By:



Elise Alldridge, regional manager of the new Brandy Melville location at the Market Mall in Calgary.

**Photograph by:** Colleen De Neve, Calgary Herald

CALGARY - Retail sales in Alberta had the highest annual growth rate among all provinces in May, according to Statistics Canada.

The federal agency reported Wednesday that sales grew by 6.5 per cent from a year ago to \$6.5 billion, which was also an increase of 0.3 per cent from the previous month.

Nationally, sales reached \$42 billion across the country, up 0.7 per cent on a monthly basis and 4.0 per cent year-over-year.

Impressive retail sales numbers in Alberta are enticing more new international retailers into the local market.

The latest is cult-favourite Brandy Melville, an original Italian fashion brand, inspired by the L.A. lifestyle, which gained its fame among Hollywood celebrities, including The Kardashians, Paris Hilton,

Lindsay Lohan, and Miley Cyrus.

When the store opened Friday at Market Mall in Calgary, a few hundred young girls lined up waiting to experience the company's 10th location in Canada.

"Our main selling point is that we are one size. So we are basically a one size fits most theory. Our clothes vary in the material and it fits a variety of people," said Elise Alldridge, regional manager for the west coast for Brandy Melville. "Our age group is definitely teenagers. I would say between 13 and 16 is our target market but with that said I'm 28 and I wear the clothes. And most of the employees range between 18 and 25 and they all wear the clothes. It really depends on your personal style.

"We have a busy store in Vancouver and we were definitely looking to expand. We would make Facebook postings to where our fans would like to see us next and Calgary was a big one."

The company opened a location at the West Edmonton Mall about a month ago.

Todd Hirsch, chief economist with ATB Financial, said Alberta shoppers filled their carts a bit more in May than they did in the previous month, stopping just short of the record-setting month they had in March.

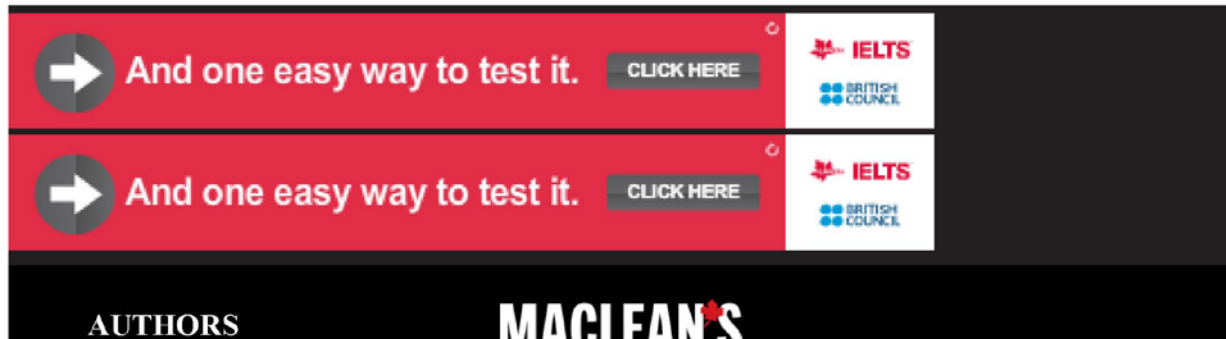
"Alberta's sales account for 15.4 per cent of Canada's total retail trade — not bad for a province with only 11.6 per cent of the country's population," he said. "The disproportionately high level of retail sales in Alberta can be explained by a couple of factors. With average weekly earnings about 23 per cent above the Canadian average, Albertans have more disposable income to spend. Also, a younger means more people in that stage of life that sees them acquiring homes, cars, baby strollers and clothes for their teenage children."

Benjamin Reitzes, senior economist with BMO Capital Markets, said Canadian consumer spending remains healthy though activity continues to be focused on autos — which are on pace for another record year. With manufacturing, wholesale and retail activity all higher in May, monthly GDP looks as though it will come in at 0.3 per cent, which would keep the second quarter on pace for 2.3 per cent annualized growth, he added.

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**AUTHORS** **MACLEAN'S**

## Taking care of business

Programs in engineering, arts and even environmental studies are embracing dollars and sense

[Adrian Lee](#)

September 21, 2014



(The Windsor Star)

The economy has changed dramatically in the 30 years since Doug Bergeron first entered the work force and, of course, Bergeron, 53, has changed with it. Best known for leading the group that purchased the credit- and debit-card terminal maker [VeriFone](#) from Hewlett-Packard for \$50 million in 2001, as CEO, he transformed it into a multinational, multi-billion-dollar company. But Bergeron, an



entrepreneur and a philanthropist, started out with an arts degree with special honours in computer science from [York University](#).

"It used to be that you got a fundamental engineering or computer science education, and you graduated and you got a job with a big company; you'd sit in a cubicle and work on some narrow part of a project and, if you did a good job [and] put your hand up, maybe you get promoted some day," said Bergeron from his office in Palo Alto, Calif.

That world no longer exists, especially in Canada: Nortel, where Bergeron began his career, went bankrupt, and RIM (now BlackBerry) is a shadow of its former self; companies are being forced to become smaller and nimbler, meaning their employees have to be more agile in their skill sets; and venture capital is harder and harder to come by, making the competition all the more intense to turn good ideas into a reality. In the meantime, entrepreneurship has caught on: Statistics Canada's latest [report](#) found 15 per cent of Canadian workers identified as self-employed.

So it's little wonder that Bergeron, who parlayed his understanding of the sciences and passion for business into a career as one of Canada's most legendary venture capitalists, is among those leading the charge to bring business into the classroom. Two years ago, he and his wife donated \$2 million to York to start the Bergeron Entrepreneurs in Science and Technology program, which provides soft business and entrepreneurial skills to students studying in STEM (science, technology, engineering and math) fields.

"The traditional engineering education in Canada needed to be recalibrated for the new world of new, smaller, faster companies and interdisciplinary work," says Bergeron. "Kids who come out of engineering programs need to be able to write business plans; they need to be able to present in front of a venture capitalist and drive home the main message; they need to be able to file for a patent."

The program is part of a trend in undergraduate and graduate programs to integrate business teachings into a broad swath of disciplines that, in some cases, would typically shy away from a capitalist bent, all in an effort to provide students with the skills to succeed in an evolving work force.

"The one-career lifetime is almost totally passé," says Ira Levine, the founding director of Ryerson University's [creative industries program](#). "I think students are aware that, four years down the line, there are going to be a lot of jobs that we haven't even heard of yet. They're aware of the rapid change in employment sectors; they're aware they may have to create their own jobs." Launched last fall, the four-year undergraduate degree brings enterprise learning to fields where business savvy is traditionally a lesser consideration: fashion, publishing, news media, film, performance studies, museum curation, and more. The so-called "creative industry," and those fields in particular, are going through radical change with evolving technology. Being enterprising allows graduates to roll with the punches. "We have to walk a fine line," Levine says. "We want to support the idealism of young people, but we also want to prepare them for the world they're going to be entering."

The program trains students in their preferred art, and gives them the nitty-gritty practical realities of their fields that are oft unseen, from handling digital rights and protecting intellectual property to understanding the value of free-trade agreements for creative exports. It also brings together business students interested in the arts, as agents or otherwise, with artists developing their skills in Ryerson's established schools, uniting them in the classroom. "The idea is that, fully sensitized to each other, we could help each other overcome that traditional gap between what we sometimes call the suits, on one hand, and creatives on the other," says Levine.

That bridging of the gap is a big part of this interdisciplinary push, especially in fields where business can be seen as the enemy. At Simon Fraser University in B.C., the brand-new, [four-year joint major in business and environment](#) blends the teachings of its faculty of environment and the Beedie School of Business. The perception, in today's conversations about pipelines and tailings-pond breaches, is that the environment is sacrificed as one of the costs of doing business, but this program sets out not only to deliver entrepreneurial skills to environmental students, but to allay that stigma. "For heaven's sake, it's about time we put that dichotomy aside. Back in the '70s, that was the conversation that was happening. Today, that whole notion is so antiquated," said Ingrid Stefanovich, the dean of the faculty of environment. "You cannot have a business practice these days without some awareness of environmental sustainability, and you can't advance environmental sustainability without also talking about how to invest and what we're going to do with our economic plan to facilitate environmental change."

Likewise, a multidisciplinary class in McGill's arts department—[The Treble Cliff: The Business of Music](#)—takes aim at the long-standing stereotype that wealth and artistic integrity are contradictions, and the class is devoted to teaching the idea that, no matter how talented an artist may be, you still need to market yourself and understand the industry. "In the traditional music industry, so many people see, 'Oh, they signed with a big record label, they're sellouts,' and they love starving artists. But even those so-called starving artists have to have some savvy; they have to know how to make money off a tour," says the class's teacher, Jui Ramaprasad. "Even if you're not Beyoncé or Jay Z, many musicians can make a life out of their music. It's just a matter of knowing the environment and how to do it well."

The ability to reinvent oneself, and the opportunity to choose another career path if and when it's needed, is a major facet of why business lessons are being splashed into the teachings of other disciplines. That's part of the reason the [M.D./M.B.A. program](#) at McGill University appealed to 28-year-old Artem Luhovy. It helps make him a better doctor—he draws parallels between the "system dynamics" of both bodies and businesses, and his knowledge of hospital operations and flow helps him understand patient perspectives better—but it also frees him to consider a career in business consulting and health care management. "It definitely provides more choice, which is nice for me, in that I wouldn't be restricted by the typical career path of a physician."

And, of course, that sense of possibility is at the root of entrepreneurship. When

Bergeron lost his job at VeriFone in 2013 after 12 years at the top, he leaned on his entrepreneurial skills to assess where he was and what he could do, before eventually founding and becoming CEO of [Opus Global Holdings](#), a private-equity firm focused on financial technology. "I spent several months trying to rediscover myself, reinvent myself," he says. "Entrepreneurship is the essence of life. It's the ability to say, 'What do we have here?'"

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### ABOUT THIS AUTHOR



Adrian Lee

Adrian Lee writes on pop culture, politics, sports, business, technology, trends, and you, if you'll let him. He is also the *Maclean's* hip-hop expert.

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### MACLEAN'S TOP STORIES

# Is Fashion Education Selling a False Dream?

Central Saint Martins and The Royal College of Art have emerged as the top schools in BoF's first Global Fashion School Rankings. But our survey also reveals widespread dissatisfaction amongst the more than 4,000 students and alumni who participated in our survey. Is fashion education selling a false dream?



**LONDON, United Kingdom** — The fashion education sector is booming. As the scale and scope of the industry has grown over the last decade, and social media has opened up a once secretive business to the masses, the appeal of fashion as a career opportunity has grown with it, leading more and more young people to pursue fashion education.

“Fashion education has grown enormously in scale compared to ten years ago,” says Sara Kozlowski, Director of Education and Professional Development at the Council of Fashion Designers of America (CFDA). “In some cases institutions have experienced

enrollment increases tripling student populations.”

In the United Kingdom, there are more than 30 colleges and universities now offering fashion degree courses, with thousands of fashion design graduates each year. And, private institutions like the Condé Nast College of Fashion and Istituto Marangoni are also muscling into the fashion education market — setting up programmes in China, India and beyond to meet the burgeoning interest in fashion education in Asia’s fast-growing economies.

So, how to navigate this increasingly complex fashion education landscape? The purpose of the BoF Global Fashion School Rankings out today is three fold: it aims to assess the value and impact of this growing sector, in hope of aiding prospective students in making informed choices about pursuing higher education in fashion; it acts as a tool for universities and colleges to improve their education offerings; and it serves as a resource for the wider industry to engage in a discussion about fashion education.

The ranking is based on a rigorous methodology incorporating 60 different data points gathered directly from a shortlist of 24 top fashion institutions, surveys completed by 4,032 students and recent alumni, feedback from 88 HR professionals and global fashion influencers and our own BoF analysis of 21 undergraduate and 10 graduate programmes around the world.

First, the good news: students are generally “satisfied” or “very satisfied” with the teaching (83 percent), the library and study materials (83 percent), and workrooms, buildings and campuses (76 percent).

Students were particularly complimentary about their teachers. “Tutors are of a very high calibre and with relevant experience from industry or still work within industry. [They] are very good at recognising potential and pushing students to produce their best work,” one former student from Central Saint Martins comments.

“I really believe FIT is among the last remaining US fashion schools that provides students with an adequate education in garment construction and patternmaking. It’s a quintessentially old-fashioned technical school, which has advantages and disadvantages alike,” writes an alumnus of the Fashion Institute of Technology in New York.

“The teachers were absolutely golden, each and every one of them has a story to tell that made me want to pursue a career in fashion even more,” adds a student from Polimoda.

However, in other areas, there remains a significant gap between the expectations of these students vis-à-vis their actual experiences while in school and after graduation. In particular, many students were significantly less satisfied with the support in finding employment.

“Brilliant school, brilliant exposure, zero help afterwards,” says one former Central Saint Martins student.

“Parsons tested my work ethic and exposed me to a diverse student body and resources, but poorly prepared students for the realities of job placement and career development,” echoes a Parsons alumnus.

Indeed, only 57 percent of the 4,032 students in our survey are satisfied with careers services, just 53 percent are satisfied with networking events and only 49 percent are satisfied with the quality of recruiters on campus. And afterwards, many disappointed students report that they end up taking jobs outside of fashion, or not finding jobs at all. With BA tuition fees costing an average of \$18,000 per year and MA tuition an average of \$23,000 per year, students are clearly looking for a better return on this significant investment.

“More emphasis is needed on career options and specific design career fairs need to be implemented as this is lacking in the programme,” says a student from Australia’s Royal Melbourne Institute of Technology. “Unfortunately there was not much help when it came to graduation and career advice. This was left up to myself,” adds another.

The underlying root cause of this global fashion education issue may be something experts have dubbed “The Project Runway Effect.” While many young people are attracted to working as fashion designers due to the growing visibility of the industry on television and social media, the growing popularity of fashion education has not been matched by a corresponding increase in fashion design jobs.

According to statistics compiled by the CFDA and the Department for Education, in 2013 there were 17,370 reported jobs as 'fashion designer' in the United States. "It's estimated that each year about 10 percent of the total job pool are graduating from undergraduate programs and entering industry with degrees in fashion design, which in turn has created an oversupply," says the CFDA's Kozlowski.

This means that each year, the US fashion sector would have to make room for 1,700 new fashion design graduates either through attrition or market growth, which seems highly unlikely. And as more and more graduates emerge each year, there are fewer and fewer jobs on offer.

It's a phenomenon that also holds true in the UK, home to seven of our top ranking fashion schools. According to data compiled by Graduate Prospects, only one in seven UK-based fashion design students graduating in 2014 found employment as designers, with the rest taking on roles in retail, marketing, sales and administration. So, while more than 85 percent of fashion design graduates ultimately find full-time employment, most of them will not work as designers.

Caroline Rush, chief executive of the British Fashion Council, is working with careers services at UK fashion colleges to improve the range of fashion related jobs that students are informed of before enrolling in university.

"Even now, I think if you go to a career advisor at school and say: 'I want to work in the fashion industry,' they say, 'Well, you have the chance to either work in retail or to be a designer,' and don't understand all of the other roles that go around that. You end up with this vicious cycle where you've got young people who think that they want to be a designer, when actually their skills might be better suited to a different role, either a skills-based role or even management or administration work," says Rush.

But, all is not lost. In a fast-changing fashion market being reshaped by new business models, emerging technologies and shifting consumer values, there are many new career paths emerging in fashion.

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“Although there is currently an imbalance of supply and demand for design graduates, the landscape is poised for new sectors within innovative and hybridised specialisations that include digital manufacturing, social innovation, sustainability and new business models,” reports Kozłowski. These new roles are increasingly important to the future of the fashion business, and offer graduates new ways to participate in this exciting sector.

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However, fashion students and alumni participating in our survey report that they feel unequipped with the practical business skills and training they need to thrive once they enter full-time employment or go on to start their own business.

Only 58 percent of students are satisfied with their business training, only 54 percent of students are satisfied with work placement opportunities and only 44 percent of students are satisfied with teaching on sustainability in the curriculum, the lowest satisfaction scores in our entire survey.

“It’s one of the most prestigious schools in the world when it comes to fashion, and just that in itself opened a lot of doors for me,” writes one Central Saint Martins alumnus. “There is a lot of controversy around the training at Saint Martins though, like the fact that we didn’t have a single technical class or business course throughout our BA. If you want to have that you are told you can go somewhere else.”

Interestingly, the most reputable schools, including Central Saint Martins, Parsons and The Royal Academy of Arts in Antwerp receive among the lowest scores in this regard. Of course, students at the top schools might be expected to be those with the highest expectations, so they are the hardest to please, but what’s clear is that these schools have a long way to go before satisfying the needs of the most talented, high-potential fashion students.

Conversely, those schools that did provide the best student experiences are neither those with the best reputations, nor those that are the most selective. Perhaps the most surprising outcome of our Global Fashion School Rankings was the outstanding feedback from students and alumni from schools off the beaten path, suggesting that prospective students may want to carefully consider a wider range of colleges when making decisions about higher education in fashion.



“Overall, I couldn’t ask for a better experience,” comments a current student at Drexel University in Philadelphia, 10th in our BA ranking. “Since coming to Drexel I have become more creative, hardworking and driven. None of that would have been possible without the exemplary staff at Drexel. My teachers have challenged me creatively and are always available for positive feedback on both my designs and my craft. They help in making sure that the students who really want to be there thrive and produce great work.”

One former student from Kingston University just outside of London, 3rd overall in our BA ranking, writes: “Impeccable teaching from tutors who really care and want to help develop you to the best of your potential. Industry links are unrivalled, with many well-paid international internships on offer.”

A student at Bunka Fashion College in Tokyo, ranked 2nd overall in our BA ranking raves: “Not being a native Japanese speaker, the first few months were overwhelming, yet exciting. It is like riding a bicycle for the first time – Bunka will hold the handles for you, teach you how to pedal and slowly let go. Suddenly, you’re having the ride of your life, and you know you did because you learnt from the best.”

As the market landscape continues to shift, fashion educators would be well advised to listen to their students and re-think the balance of their course offerings to better reflect the changing needs of the industry. At some schools, this is already happening.

This year, the London College of Fashion launched a new Fashion Business School, following the pioneering Centre for Sustainable Fashion, established in 2008. The Pratt Institute has opened its own Centre for Sustainable Design, integrating environmental and societal design principles into its programmes. Drexel University is in the midst of developing new graduate programmes in interdisciplinary design, in keeping with industry developments, the University of Creative Arts in Epsom is further developing its Design Business Institute, launched in 2014, and Polimoda is developing platforms to support fashion entrepreneurship.

What’s clear is that the fashion education landscape is in an exciting period of flux. We hope that our Global Ranking of Fashion Schools will provide fodder for discussion and debate in the years to come as the fashion industry enters a new period of growth and

expansion.

*What do you think constitutes a high quality, rewarding fashion education? Share your thoughts in the comments below. To view the full BoF Global Fashion School Rankings 2015 and learn more about our ranking methodology, [click here](#).*

## World's Top-Selling Lululemon Store to Substantially Expand

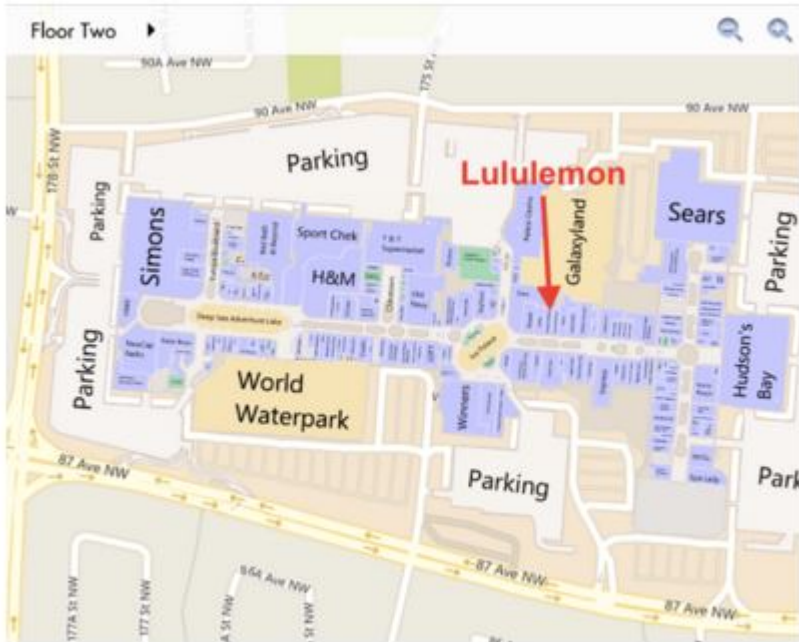
On October 25, 2015



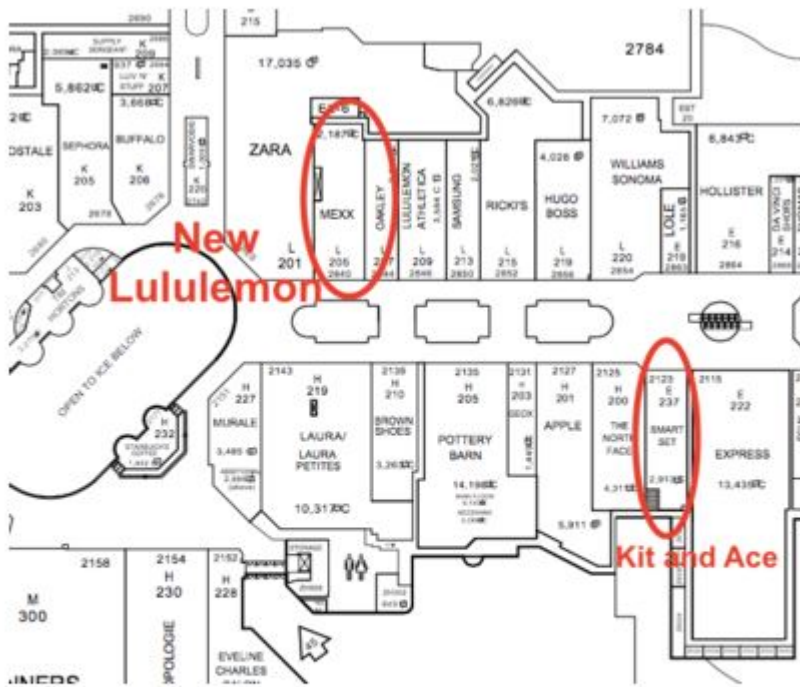
*Hoarding shows the new store next to the existing location. Photo: Darrell Bateman*

The world's top-selling Lululemon store will soon double in size, with hoarding indicating that the new location will open 'late winter 2015'. The store is one of Canada's most productive retail spaces.

Currently measuring 3,585 square feet, West Edmonton Mall's Lululemon does over \$25 million in annual sales. Two adjacent retail spaces, formerly occupied by Oakley and Mexx, will merge to create the new 6,970 square foot Lululemon store. Sales at the current location are in excess of \$7,000 per square foot annually. If the new location were to achieve similar sales, it could see sales in the \$50 million range - higher than most suburban department stores, and one of the highest-selling stores in Alberta.



Click image above for interactive West Edmonton Mall map



Located on the second level of the mall's 'Phase II', Lululemon enjoys substantial foot traffic. Across the hall is a busy Apple Store and two doors down, Vancouver-based Kit and Ace will soon open a permanent, 2,900 square foot store in the mall's former Smart Set space. Kit and Ace was founded by Lululemon founder Chip Wilson's wife, Shannon, and son, JJ.

**OUTLINE OF ISSUE**

Agenda Title: **Proposed New Mandatory Student Instructional Support Fees, Proposed Deletion of Mandatory Student Instructional Support Fee, New Other Fees, and the Updated Mandatory Non-Instructional Fee Schedule**

**Motion:** THAT the GFC Academic Planning Committee, with delegated authority from General Faculties Council, recommend the Board of Governors approve: the proposed new Mandatory Student Instructional Support Fees (set forth in Attachment 1); the proposed Deletion of Mandatory Student Instructional Support Fee (set forth in Attachment 2); ~~and the proposed New Other fees (set forth in Attachment 3)~~ as submitted on behalf of the relevant Faculties/Departments by the Registrar’s Advisory Committee on Fees (RACF), to take effect as noted in each respective attachment.

Note: Also included herein is an updated Mandatory Non-Instructional Fee Schedule, for information purposes only, as set forth in Attachment 4.

**Item**

Action Requested	<input type="checkbox"/> Approval <input checked="" type="checkbox"/> Recommendation <input type="checkbox"/> Discussion/Advice <input type="checkbox"/> Information
Proposed by	Assistant Registrar and the Faculties and Departments that have proposed the new and changed fees.
Presenter	Tom Hidson, Assistant Registrar
Subject	Mandatory Student Instructional Support Fees proposed new fees, deletion of existing fee and Faculty of Medicine Supplemental Application Fee

**Details**

Responsibility	Provost and Vice-President (Academic)
The Purpose of the Proposal is (please be specific)	To establish new Mandatory Student Instructional Support Fees, delete existing Mandatory Student Instructional Support Fee and establish new other fees as outlined in each proposal.
The Impact of the Proposal is	See ‘Purpose’.
Replaces/Revises (eg, policies, resolutions)	Creates new Mandatory Student Instructional Support Fees, deletes existing Mandatory Student Instructional Support Fee and creates new other fee.
Timeline/Implementation Date	Implementation dates vary; see the attachments for detail.
Estimated Cost	N/A
Sources of Funding	N/A
Notes	Representatives of the proposing units will also be in attendance at the February 10, 2016 meeting of GFC APC to respond to questions.

**Alignment/Compliance**

Alignment with Guiding Documents	<i>University of Alberta Calendar</i> ; UAPPOL (University of Alberta Policies and Procedures On Line)
Compliance with Legislation, Policy and/or Procedure Relevant to the Proposal (please quote legislation and include identifying section numbers)	1. <b>Post-Secondary Learning Act (PSLA): Sections 61(1) and (2)(a) -</b>  “ <b>Tuition fees</b> 61 (1) The board of a public post-secondary institution shall set the tuition fees to be paid by students of the public post-secondary institution. (2) The tuition fees under subsection (1) for all public post-secondary institutions other than Banff Centre (a) must be set in accordance with the regulations[.]”

**2. *Post-Secondary Learning Act (PSLA) Regulations – Alberta Regulation 273/2006 – Section 2:***

“Definition of tuition fees for Act purposes, etc.

2. For the purposes of the Act and this Regulation, ‘tuition fees’ in respect of an institution means the following:

(a) fees identified in the institution’s calendar or in a supplement to its calendar as tuition fees or fees for instruction for courses that are part of programs approved by the Minister under the *Programs of Study Regulation* (AR 91/2009) or for the purposes of the *Student Financial Assistance Act*, excluding the following:

- (i) courses taken as part of a distance delivery program by individuals who do not reside in Alberta;
- (ii) apprenticeship programs under the *Apprenticeship and Industry Training Act*;
- (iii) off-campus cost recovery instruction programs;
- (iv) courses provided under a third party contract;
- (v) any differential or surcharge in fees that the board of the institution may set for courses taken by individuals who are not Canadian citizens or permanent residents of Canada;

(b) mandatory fees that are payable to the institution by students for materials and services that facilitate instruction in the courses included in clause (a), excluding the following:

- (i) fees for equipment or materials that are retained or leased by students;
- (ii) fees charged in respect of work placements or practicum experience where the persons or unincorporated bodies providing the work placement or practicum experience do not receive funding from the Government in respect of it.”

**3. *Post-Secondary Learning Act (PSLA):*** The *PSLA* gives GFC responsibility, subject to the authority of the Board of Governors, over academic affairs (Section 26(1)). Section 26(1)(o) provides that GFC may make recommendations to the Board of Governors on a number of matters including the budget and academic planning. GFC has thus established an Academic Planning Committee (GFC APC), as set out in Section 3 of the GFC Policy Manual. GFC delegates its power to recommend to the Board on the budget to the GFC APC.

**4. Board of Governors General Terms of Reference, Section 1 (b):**

“The Board has delegated to each Committee responsibility and authority to make decisions on behalf of the Board in the Committee’s defined area of responsibility except to the extent that such authority has been specifically limited by the Board in the Terms of Reference for the Committee.”

**5. Board Finance and Property (BFPC) Terms of Reference, Section 3(d):**

“3. Without limiting the generality of the foregoing, the Committee shall:

[. . .]

d) review and recommend to the Board tuition and other like fees[.]”

	<p><b>6. UAPPOL Student Instructional Support Fee Definition of Mandatory Instructional Support Fee:</b> “Mandatory fees assessed in anticipation of costs for supplies, equipment, materials, or services which are not directly related to the delivery of instruction in a course or program, but are considered required elements of a course or program. Examples include but are not limited to the costs of food, lodging, and transportation for required field trips; supply of certain specialized professional tools which the student will retain; and fees for arranging professional placements such as practica, internships, and work experience. All mandatory instructional support fees require the approval of the Board of Governors.”</p> <p><b>7. University of Alberta Calendar Section 22.2.3:</b> “The University of Alberta complies with the Government of Alberta’s Tuition Fee Policy which states that postsecondary institutions may charge mandatory student fees for instruction to support the provision of supplies, equipment, materials and services to students.”</p> <p><b>8. GFC Academic Planning Committee (APC) Terms of Reference (3. Mandate)</b> “4. Budget Matters [...] b. To recommend to the Board of Governors on the annual budget, excluding budgets for ancillary units.”</p> <p>9. At its meeting of February 10, 2012, the <b>Board of Governors</b> approved the following Motion:</p> <p style="padding-left: 40px;">“THAT the Board of Governors, on the recommendation of the Board Finance and Property Committee, rescind the “Church/Minsos” Board-approved Motion of May 5, 2000 regarding the Indexing of Mandatory Non-Instructional Fees; and</p> <p style="padding-left: 40px;">THAT the Board of Governors, on the recommendation of the Board Finance and Property Committee, approve the annual adjustment of all Mandatory Non-Instructional Fees (MNIF), as determined by Administration, up to and including the Annual Alberta Consumer Price Index and that the MNIF be reported for information to the GFC Academic Planning Committee, the Board Finance and Property Committee, and the Board of Governors on an annual basis.”</p>
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**Routing** (Include meeting dates)

Consultative Route (parties who have seen the proposal and in what capacity)	Registrar’s Advisory Committee on Fees (RACF), at which each proposal was discussed with the Committee members and the representatives from the Faculties and Departments that were recommending the new fees. In addition, each proposal details the consultation completed by each proposer.
Approval Route (Governance) (including meeting dates)	GFC Academic Planning Committee – February 10, 2016 (for recommendation); Board Finance and Property Committee – March 01, 2016 (for recommendation); Board of Governors – March 18, 2016 (for final approval)

Final Approver	Board of Governors
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Attachments:

The overall attachment represents the proposed new Mandatory Student Instructional Support Fees, a proposal to delete a Mandatory Student Instructional Support Fee, a proposed New Other Fee and the updated Non-Instructional Fee Schedule. It is subsequently broken down in the following manner:

1. Attachment 1 (pages 5 – 53): Proposals for New Mandatory Student Instructional Support Fees
2. Attachment 2 (pages 54 - 56): Proposal for Deletion of Mandatory Student Instructional Support Fee
3. ~~Attachment 3 (pages 57 – 61): Proposal for New Other Fees~~
4. Attachment 4 (pages 62 – 63): Updated Mandatory Non-Instructional Fee Schedule (for Informational Purposes Only)

Prepared by: Angelene Lavers, Office of the Registrar, [Angelene.Lavers@ualberta.ca](mailto:Angelene.Lavers@ualberta.ca)



## Attachment 1

### **Proposals for New Mandatory Student Instructional Support Fees**

<b>Course</b>	<b>Implementation</b>	<b>Fee</b>	<b>Page Number</b>
AUCSL 361	May 1, 2016	\$0 - \$1500	6
AUGER 425	May 1, 2016	\$2000 - \$4000	8
AUGER 525	May 1, 2016	\$2000 - \$4000	11
AUIDS 287/387	May 1, 2016	\$0 - \$6000	14
ANTHR 397/573	May 1, 2016	\$600 - \$3000	17
PLAN 599	September 1, 2016	\$1000 - \$3500	20
EDPY 518 (Required Course)	September 1, 2016	\$150	26
EDPY 519 (Required Course)	September 1, 2016	\$325	29
EDPY 543 (Required Course)	September 1, 2016	\$480	34
EDPY 547	September 1, 2016	\$395	37
ALES 291/391/491	May 1, 2016	\$0 - \$5000	51

Mandatory fees assessed in anticipation of costs for supplies, equipment, materials, or services which are not directly related to the delivery of instruction in a course or program, but are considered required elements of a course or program. Examples include but are not limited to the costs of food, lodging, and transportation for required field trips; supply of certain specialized professional tools which the student will retain; and fees for arranging professional placements such as practica, internships, and work experience. All mandatory instructional support fees require the approval of the Board of Governors.

Definition taken from UAPPOL Student Instructional Support Fee Definition of Mandatory Instructional Support Fee

## Registrar's Advisory Committee on Fees (RACF)

For the meeting of: November 24, 2015

Item No. <02>

### Request for Approval for: AUCSL 361 Community Service-Learning Practicum

#### Fee Type (see end of form for definitions)\*:

- Mandatory Student Instructional Support Fee**
- Alternate Delivery Fee**
- Cost Recovery Fee**
- Other**

**OUTLINE OF ISSUE:** Request the implementation of a \$0 – 1500 MIS Fee for the new Augustana Faculty AUCSL 361 Community Service-Learning Practicum course, primarily to facilitate opportunities for Community-Service Learning experiences for students seeking Science credits towards their degree program.

*Put N/A in any boxes that do not apply*

#### Proposer

Faculty/Department	Augustana Faculty, Department of Social Sciences
Dean/Chair	Dean of Augustana Faculty: Allen Berger Chair of Social Sciences Department: Jeremy Mouat
Primary Contact (Name, phone number, and e-mail)	Karsten Mündel, 780.679.1557, karsten.mundel@ualberta.ca Jeremy Mouat, 780.679.1633 jmouat@ualberta.ca
Secondary Contact (Name, phone number, and e-mail)	Jonathan Hawkins 780-679-1117 jh12@ualberta.ca

#### Item

Purpose of Fee (what it is to be used for)	The Community Service-Learning Practicum course gives students an opportunity to grapple with the process-related issues of CSL, which include working with community partners, working in groups and addressing their own skills and shortcomings. Many practica may be very close to campus and therefore require no collection of fee (hence a range starting at \$0), but opportunities may arise with partners located outside of Camrose. If the course happens at a distance from campus, fees collected will cover transportation, meals and accommodation and other program costs.
Proposed Amount	\$ 0 – 1500.
Previous Fee Amount (if this is a new fee, please indicate that here)	This is a new course. However, it is modelled after the current AUCSL 360 course, which has an established fee of \$0-1500. This course offers credit for a community-service learning practicum which receive Arts credits, whereas the proposed 361 would allow for a CSL practicum to receive Science credits.
Requested Implementation	Spring, 2016

Date	
The Impact of the Fee (number of students affected, etc.)	Will vary depending on particular topic and immersion experience, but typically the course will have a minimum enrolment of 12 and a maximum of 25.
Collected Centrally or by Department	Department

### Course Information (if fee is attached to a course)

Course Name(s)	AUCSL 361 Community Service-Learning Practicum
Required Course(s)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
New or Existing Course(s)	New, but modelled after AUCSL 360.
New or Existing Program (include name)	This course is one of the central components to the Augustana Community Service Learning program, and also serves as credits for students seeking to acquire a Faculty of Arts Certificate in Community Engagement and Service-Learning.
Course Description(s)	<b>AUCSL 361 Community Service-Learning Practicum</b> *3 (fi 6) (variable, 0-3s-0). Content varies from year to year but will include a significant service component. Topics and credit value announced prior to registration period. Pre/corequisite: consent of the instructor. Note: AUCSL 361 is classified as a science course.

### Details

Estimated Costs (Budget information may be included here or as an attachment)	Will vary depending on the particular practicum experience.
Explanatory Notes	In many cases, student practica will occur in Camrose/close to campus, in which case no fee will be required (an example of this could be Science students working with students in the local public school division on developing Science Fair projects). It is possible that an opportunity could arise further away, in which case the fee will cover the transportation costs to the service-learning site(s) as well as any associated food and lodging costs. This flexibility is especially important as Augustana prepares to implement a new 3-week/11-week session structure within its Fall and Winter terms beginning in September 2017, which could create opportunities for intensive 3-week CSL practica at a distance, without creating course conflicts for participating students.

### Routing (For Mandatory Student Instructional Support Fees and Non-Instructional Fees)

Consultative Route (parties who have seen the proposal prior to Registrar's Advisory Committee on Fees and in what capacity)	Department of Social Sciences, Augustana Faculty. Curriculum Committee, Augustana Faculty Augustana Faculty Council (each of these bodies including voting student representatives who expressed no concerns with the proposal).
Advisory Route (RACF) Include dates	RACF – November 24, 2015
Approval Route* (Governance) *The approval process is initiated in January for the next academic year	GFC Academic Planning Committee (APC) Board Finance and Property Committee (BFPC) Board of Governors (BG)
Final Approver	Board of Governors

## Registrar's Advisory Committee on Fees (RACF)

For the meeting of: November 24, 2015

Item No. <03>

### Request for Approval for: AUGER 425 German Language Teaching and Learning

#### Fee Type (see end of form for definitions)\*:

- Mandatory Student Instructional Support Fee**
- Alternate Delivery Fee**
- Cost Recovery Fee**
- Other**

**OUTLINE OF ISSUE:** Request the implementation of a \$2000 – 4000 MIS Fee for the Augustana Faculty AUGER 425 German Language Teaching and Learning course, to be offered as part of the Canadian Summer School in Germany (CSSG) program.

*Put N/A in any boxes that do not apply*

#### Proposer

Faculty/Department	Augustana Faculty, Department of Fine Arts and Humanities
Dean/Chair	Dean of Augustana Faculty: Allen Berger Chair of Fine Arts and Humanities Department: Kim Misfeldt
Primary Contact (Name, phone number, and e-mail)	Kim Misfeldt 780-679-1162 kim.misfeldt@ualberta.ca
Secondary Contact (Name, phone number, and e-mail)	Jonathan Hawkins 780-679-1117 jh12@ualberta.ca

#### Item

Purpose of Fee (what it is to be used for)	Transportation, accommodation and meals, social/cultural activities in Germany.
Proposed Amount	\$ 2000 – 4000.
Previous Fee Amount (if this is a new fee, please indicate that here)	This is a new course. The requested fee of \$2000 – 4000 is the same fee currently attached to all the other courses associated with the CSSG program, AUGER 200, 300, 400, and 415.
Requested Implementation Date	Spring, 2016
The Impact of the Fee (number of students affected, etc.)	CSSG historically consists of approximately 60-65 students from U of A and other Canadian institutions. AUGER 425 will likely include 5-10 students.
Collected Centrally or by Department	Department

#### Course Information (if fee is attached to a course)

Course Name(s)	AUGER 425 German Language Teaching and Learning
Required Course(s)	<input type="checkbox"/> Yes

	<input checked="" type="checkbox"/> No
New or Existing Course(s)	New course in the CSSG program
New or Existing Program (include name)	Existing programs include BA major in Modern Languages; BA, BSc, BMgt, BMus minors in German. CSSG is organized under the auspices of the Canadian Association of University Teachers of German, and thus features students from a wide variety of other Canadian universities as well.
Course Description(s)	<b>AUGER 425 German Language Teaching and Learning *3 (fi 6)</b> (Spring/Summer, variable). Intensive blended course designed to improve students' understanding and application of second language acquisition theories and pedagogical content knowledge through online and classroom instruction as well as an immersion experience. This course will examine approaches such as content and language integrated learning, drama pedagogy, intercultural ethnography, and task-based language teaching in an immersion setting. Students will also enhance their own German language skills, specifically as relating to everyday interaction, classroom language, and language awareness. Further development of knowledge about German culture, society, and/or history for the purpose of instruction in Canada is also integral to this course. The course materials, instruction and assignments will be in English and German; the immersion component will be entirely in German. Prerequisite: a working knowledge of German and consent of Department. Note: Students enrolling in this course must be able to demonstrate a high level of German language proficiency. This course is intended for pre-service teachers.

### Details

Estimated Costs (Budget information may be included here or as an attachment)	General Expenses of proposed Spring 2016 AUGER 425 course	
	Expenses:	<b>Assumes 8 students</b>
	Accommodation and meals in Kassel	9,200.00
	Travel/accommodation on tours in Germany	8,600.00
	Social/Cultural Activities	3,000.00
	<b>Total Expenses</b>	<b>20,800.00</b>
	<b>Total Expense per student</b>	<b>2,600.00</b>
Explanatory Notes	<p>The proposed fee range is the same as the current fee attached to the other Augustana Canadian Summer School in Germany (CSSG) courses, AUGER 200, 300, 400, and 415.</p> <p>Over a period of approximately 6 1/2 weeks, CCSG students participate in a full course (based in Kassel) and in numerous additional activities: lectures at various museums, visits to theatres and operas, excursions to cities with cultural and historical significance, and a four-day trip to Berlin. The main feature of the program is the students' rapid progress in linguistic skills enhanced mainly by the fact that they are immersed in German life, culture and civilization.</p>	

### Routing (For Mandatory Student Instructional Support Fees and Non-Instructional Fees)

Consultative Route (parties who have seen the proposal prior to Registrar's Advisory Committee on Fees and in what capacity)	Department of Fine Arts and Humanities, Augustana Faculty. Curriculum Committee, Augustana Faculty Augustana Faculty Council (each of these bodies including voting student representatives who expressed no concerns with the proposal).
Advisory Route (RACF) Include	RACF – November 24, 2015

dates	
Approval Route* (Governance) *The approval process is initiated in January for the next academic year	GFC Academic Planning Committee (APC) Board Finance and Property Committee (BFPC) Board of Governors (BG)
Final Approver	Board of Governors

## Registrar's Advisory Committee on Fees (RACF)

For the meeting of: November 24, 2015

Item No. <04>

**Request for Approval for: AUGER 525 German Language Teaching and Learning**

**Fee Type (see end of form for definitions)\*:**

- Mandatory Student Instructional Support Fee**
- Alternate Delivery Fee**
- Cost Recovery Fee**
- Other**

**OUTLINE OF ISSUE:** Request the implementation of a \$2000 – 4000 MIS Fee for the Augustana Faculty AUGER 525 German Language Teaching and Learning course, to be offered as part of the Canadian Summer School in Germany (CSSG) program.

*Put N/A in any boxes that do not apply*

**Proposer**

Faculty/Department	Augustana Faculty, Department of Fine Arts and Humanities
Dean/Chair	Dean of Augustana Faculty: Allen Berger Chair of Fine Arts and Humanities Department: Kim Misfeldt
Primary Contact (Name, phone number, and e-mail)	Kim Misfeldt 780-679-1162 kim.misfeldt@ualberta.ca
Secondary Contact (Name, phone number, and e-mail)	Jonathan Hawkins 780-679-1117 jh12@ualberta.ca

**Item**

Purpose of Fee (what it is to be used for)	Transportation, accommodation and meals, social/cultural activities in Germany.
Proposed Amount	\$ 2000 – 4000.
Previous Fee Amount (if this is a new fee, please indicate that here)	This is a new course. The requested fee of \$2000 – 4000 is the same fee currently attached to all the other courses associated with the CSSG program, AUGER 200, 300, 400, and 415.
Requested Implementation Date	Spring, 2016
The Impact of the Fee (number of students affected, etc.)	CSSG historically consists of approximately 60-65 students from U of A and other Canadian institutions. AUGER 525 will likely include 2-4 students.
Collected Centrally or by Department	Department

**Course Information (if fee is attached to a course)**

Course Name(s)	AUGER 525 German Language Teaching and Learning
Required Course(s)	<input type="checkbox"/> Yes

	<input checked="" type="checkbox"/> No
New or Existing Course(s)	New course in the CSSG program
New or Existing Program (include name)	Existing programs include BA major in Modern Languages; BA, BSc, BMgt, BMus minors in German. CSSG is organized under the auspices of the Canadian Association of University Teachers of German, and thus features students from a wide variety of other Canadian universities as well.
Course Description(s)	<b>AUGER 525 German Language Teaching and Learning *3 (fi 6)</b> (Spring/Summer, variable). Intensive blended course designed to improve students' understanding and application of second language acquisition theories and pedagogical content knowledge through online and classroom instruction as well as an immersion experience. This course will examine approaches such as content and language integrated learning, drama pedagogy, intercultural ethnography, and task-based language teaching in an immersion setting. Students will also enhance their own German language skills, specifically as relating to everyday interaction, classroom language, and language awareness. Further development of knowledge about German culture, society, and/or history for the purpose of instruction in Canada is also integral to this course. The course materials, instruction and assignments will be in English and German; the immersion component will be entirely in German. Prerequisite: a working knowledge of German and consent of Department. Note: Students enrolling in this course must be able to demonstrate a high level of German language proficiency. This course is intended for in-service teachers.

### Details

Estimated Costs (Budget information may be included here or as an attachment)	General Expenses of proposed Spring 2016 AUGER 525 course	
	Expenses:	<b>Assumes 4 students</b>
	Accommodation and meals in Kassel	4,600.00
	Travel/accommodation on tours in Germany	4,300.00
	Social/Cultural Activities	1,500.00
	<b>Total Expenses</b>	<b>10,400.00</b>
	<b>Total Expense per student</b>	<b>2,600.00</b>
Explanatory Notes	<p>The proposed fee range is the same as the current fee attached to the other Augustana Canadian Summer School in Germany (CSSG) courses, AUGER 200, 300, 400, and 415.</p> <p>Over a period of approximately 6 1/2 weeks, CCSG students participate in a full course (based in Kassel) and in numerous additional activities: lectures at various museums, visits to theatres and operas, excursions to cities with cultural and historical significance, and a four-day trip to Berlin. The main feature of the program is the students' rapid progress in linguistic skills enhanced mainly by the fact that they are immersed in German life, culture and civilization.</p>	

### Routing (For Mandatory Student Instructional Support Fees and Non-Instructional Fees)

Consultative Route (parties who have seen the proposal prior to Registrar's Advisory Committee on Fees and in what capacity)	Department of Fine Arts and Humanities, Augustana Faculty. Curriculum Committee, Augustana Faculty Augustana Faculty Council (each of these bodies including voting student representatives who expressed no concerns with the proposal).
Advisory Route (RACF) Include	RACF – November 24, 2015



dates	
Approval Route* (Governance) *The approval process is initiated in January for the next academic year	GFC Academic Planning Committee (APC) Board Finance and Property Committee (BFPC) Board of Governors (BG)
Final Approver	Board of Governors

## Registrar's Advisory Committee on Fees (RACF)

For the meeting of: November 24, 2015

Item No. <05>

### Request for Approval for: AUIDS 287/387 Selected Topics in Place-Based Studies

#### Fee Type (see end of form for definitions)\*:

- Mandatory Student Instructional Support Fee**
- Alternate Delivery Fee**
- Cost Recovery Fee**
- Other**

**OUTLINE OF ISSUE:** Request the implementation of a \$0 – 6000 MIS Fee for two Augustana Faculty AUIDS Selected Topics courses, primarily to facilitate opportunities for one-time only 'place-based study' offerings for students seeking Science credits towards their degree program.

*Put N/A in any boxes that do not apply*

#### Proposer

Faculty/Department	Augustana Faculty, Department of Social Sciences
Dean/Chair	Dean of Augustana Faculty: Allen Berger Chair of Social Sciences Department: Jeremy Mouat
Primary Contact (Name, phone number, and e-mail)	Karsten Mündel, 780.679.1557, karsten.mundel@ualberta.ca Jeremy Mouat, 780.679.1633 jmouat@ualberta.ca
Secondary Contact (Name, phone number, and e-mail)	Jonathan Hawkins 780-679-1117 jh12@ualberta.ca

#### Item

Purpose of Fee (what it is to be used for)	Topics in place-based studies is a course that leads students in an in-depth exploration of a specific place. Those places may be very close to campus and therefore require no collection of fee (hence a range starting at \$0) or may take place in international or remote places (\$6000 is the current maximum fee attached to an international study experience). If the course happens at a distance from campus, fees collected will cover transportation, meals and accommodation and other program costs.
Proposed Amount	\$ 0 – 6000.
Previous Fee Amount (if this is a new fee, please indicate that here)	These are new courses. However, they are paired with the current AUIDS 286/386 courses, which have an established fee of \$0-6000. Those courses offer credit for place-based studies which receive Arts credits, whereas the proposed 287/387 would allow for place-based studies to receive Science credits.
Requested Implementation Date	Spring, 2016
The Impact of the Fee (number	Will vary depending on particular topic and destination, but typically the

of students affected, etc.)	course will have a minimum enrolment of 15 and a maximum of 25.
Collected Centrally or by Department	Department

### Course Information (if fee is attached to a course)

Course Name(s)	AUIDS 287/387 Selected Topics in Place-Based Studies
Required Course(s)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
New or Existing Course(s)	New, but modelled after AUIDS 286/386.
New or Existing Program (include name)	These courses were created as AUIDS courses with the specific intention of giving them the flexibility to be used in connection with any discipline in Augustana Faculty for one-time only place-based study opportunities. The expectation is that, should a subsequent desire arise to repeat a particular opportunity, then a specific course will be created through all the standard approval processes. As such, these may be utilized as necessary by any current program offered in Augustana Faculty. The 287/387 courses are intended primarily for Science-based disciplines.
Course Description(s)	<p><b>AUIDS 287 Selected Topics in Place-Based Studies</b>  *3 (fi 6) (variable, 0-3s-0). Selected topics in place-based learning in specific off-campus locations. The focus and content of each course are determined by student and faculty interests, and may vary from year to year. The course will take a specific place as the location and subject of study. The locations of study can be international or closer to home, but in all instances will encourage a significant engagement with the place. Note: AUIDS 287 is classified as a science course.</p> <p><b>AUIDS 387 Selected Topics in Place-Based Studies</b>  *3 (fi 6) (variable, 0-3s-0). Selected topics in place-based learning in specific off-campus locations. The focus and content of each course are determined by student and faculty interests, and may vary from year to year. The course will take a specific place as the location and subject of study. The locations of study can be international or closer to home, but in all instances will encourage a significant engagement with the place. Note: AUIDS 387 is classified as a science course.</p>

### Details

Estimated Costs (Budget information may be included here or as an attachment)	<p>Will vary depending on the particular destination.</p> <p>Possible local experience: Travel: \$0 - 200</p> <p>Previous significant trip using the 286/386 course designators: Vienna, Spring 2015. Approximate individual costs were:</p> <table> <tr> <td>Airfare:</td> <td>\$1000</td> </tr> <tr> <td>Travel within Austria:</td> <td>\$ 250</td> </tr> <tr> <td>Accommodation:</td> <td>\$1000</td> </tr> <tr> <td>Meals:</td> <td>\$ 500</td> </tr> <tr> <td><u>Social/Cultural Events/Admission:</u></td> <td><u>\$ 250</u></td> </tr> <tr> <td><b>Total:</b></td> <td><b>\$3000 per student</b></td> </tr> </table>	Airfare:	\$1000	Travel within Austria:	\$ 250	Accommodation:	\$1000	Meals:	\$ 500	<u>Social/Cultural Events/Admission:</u>	<u>\$ 250</u>	<b>Total:</b>	<b>\$3000 per student</b>
Airfare:	\$1000												
Travel within Austria:	\$ 250												
Accommodation:	\$1000												
Meals:	\$ 500												
<u>Social/Cultural Events/Admission:</u>	<u>\$ 250</u>												
<b>Total:</b>	<b>\$3000 per student</b>												
Explanatory Notes	In cases where a fee is collected, it will generally reflect the standard costs of a significant field trip or extended travel course offering, namely transportation, meals and accommodation and other program costs.												

	<p>A possible example of a local experience could be Alberta Centre for Sustainable Rural Communities (ACSRC) Summer Rural Interns expanding their summer research experience into a Fall term project. ACSRC interns have worked in a wide variety of rural communities, mainly in East Central Alberta, including Camrose. In such case, the fee would likely cover occasional travel to/from the place of study (or, in the case of a Camrose-based project, no fee may be required). Another possibility could be potential new courses using the UofA-Augustana Miquelon Research Station, which would require occasional travel to the station via bus with a cost of \$50-200</p> <p>The Vienna trip for Spring 2015 serves as an example of a more significant trip using the AUIDS 286/386 courses. It originated from the Fine Arts Department at Augustana, involving a 2-week trip to Austria, and includes attendance at 6 different music performances, various museum and gallery visits, and other study opportunities. As noted above, this required a fee of approximately \$3000. A trip to a less-accessible international location, and/or of longer duration, might require a greater fee; hence the high-end range proposed of \$6000.</p> <p>Aside from the desire to have the flexibility in course development offered by introducing AUIDS 287/387 as science credits, there are very early discussions occurring for a possible collaborative offering in Kenya between Economics and Chemistry for a couple of weeks. It is in the very early planning stages, but should it come to fruition, having an opportunity for science credits to be included is very attractive to the organizers and potential students.</p>
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**Routing (For Mandatory Student Instructional Support Fees and Non-Instructional Fees)**

<p>Consultative Route (parties who have seen the proposal prior to Registrar’s Advisory Committee on Fees and in what capacity)</p>	<p>Department of Science, Augustana Faculty. Department of Social Sciences, Augustana Faculty. Curriculum Committee, Augustana Faculty Augustana Faculty Council (each of these bodies including voting student representatives who expressed no concerns with the proposal).</p>
<p>Advisory Route (RACF) Include dates</p>	<p>RACF – November 24, 2015</p>
<p>Approval Route* (Governance) *The approval process is initiated in January for the next academic year</p>	<p>GFC Academic Planning Committee (APC) Board Finance and Property Committee (BFPC) Board of Governors (BG)</p>
<p>Final Approver</p>	<p>Board of Governors</p>

## Registrar's Advisory Committee on Fees (RACF)

For the meeting of: October 20, 2015

Item No. <05>

### Request for Approval for: Anthr 397/573

#### Fee Type (see end of form for definitions)\*:

- Mandatory Student Instructional Support Fee**
- Alternate Delivery Fee**
- Cost Recovery Fee / Revenue Generation**
- Other**

#### OUTLINE OF ISSUE:

This is to accompany the Faculty of Arts Calendar Change Request Form (early implementation) for two new courses – ANTHR 397: Anthropological Field Training \*6 (fi 12) (Spring-Summer 3-0-3), and ANTHR 573: Advanced Field Training \*6 (fi 12) (Spring-Summer 3-0-3). The rationale is that the existing ANTHR 396 is listed as archaeology field school, and there is a need to allow for a field school in socio-cultural anthropology as well. ANTHR 573 will then just be the graduate course number for students wishing to take either ANTHR 396 OR 397. Such a socio-cultural field school course was taught in Spring session 2015 by Dr. Marko Zivkovic using the ANTHR 396. The plan is to make this socio-cultural field school a permanent offering in the future. There is already a MSISF approval in place for the ANTHR 396 field school with three locations, Alberta, Japan and Serbia. We propose the same MSISF for the new ANTHR 397 & 573 Anthropological/Advanced Field Training courses. These courses will contain both a classroom and practical field training components. The classroom component will include introduction to Serbian and wider Balkan society and culture. The practical field training will be designed so as not to require any knowledge of the local language (will focus on non-verbal forms of observation and participation). Training will be based in Belgrade, with one 6-day and one 4-day trip outside Belgrade and will be six weeks long. Location and details may change in the future. The course is aimed at students of social sciences and humanities who wish to learn how to enhance their understanding of foreign cultures and cross-cultural communication. All activities will be closely supervised by experts in both the native culture and ethnographic fieldwork methods.

*Put N/A in any boxes that do not apply*

#### Proposer

Faculty/Department	Anthropology
Dean/Chair	Pamela Willoughby (Chair, Anthropology)
Primary Contact (Name, phone number, and e-mail)	Marko Zivkovic, 780 492-5352 zivkovic@ualberta.ca
Secondary Contact (Name, phone number, and e-mail)	N/A

#### Item

Purpose of Fee (what it is to be used for)	Accommodations, food, on-site transportation, venue and activities fees
Proposed Amount	\$600-\$3000 CAD
Previous Fee Amount (if this is a new fee, please indicate that here)	n/a
Requested Implementation	May 1, 2016. Note: \$500.00 deposit will be due April 1, 2016 with

Date	remaining fee to be paid by May 1, 2016.
The Impact of the Fee (number of students affected, etc.)	15
Collected Centrally or by Department	Centrally

### Course Information (if fee is attached to a course)

Course Name(s)	ANTHR 397/573: Anthropological/Advanced Field Training: Fieldschool for Ethnographic Sensibility in Belgrade, Serbia
Required Course(s)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
The course/program is on or off campus	<input type="checkbox"/> On-Campus <input checked="" type="checkbox"/> Off-Campus
New or Existing Course(s)	New courses, but based on ANTHR 396 conducted in Belgrade, Serbia June 1-28, 2015. ANTHR 573 for grad students wishing to take 396/397. Special Sessions Spring-Summer Term, Department of Anthropology: <i>ANTH 397/573: Anthropological/Advanced Field Training</i>
New or Existing Program (include name)	
Course Description(s)	ANTHR 397/573 Anthropological/Advanced Field Training: Fieldschool for Ethnographic Sensibility in Belgrade, Serbia is designed to train students in a range of ethnographic fieldwork techniques that focus on non-verbal aspects of social life in an unfamiliar culture. Students will learn to attend to ways people interact with places and things through a range of special exercises that emphasize learning culture through physical participation. In the field, under staff supervision, they will carefully observe, record, describe and contextualize cultural practices. Students will keep field journals and make final presentations on their fieldwork, accompanied by a written report.

### Details

Estimated Costs (Budget information may be included here or as an attachment)	Total MSISF requested for 2016: <b>\$2400</b> Accommodations per student: \$1500 Food per student: \$150 On-site transportation per student: \$150 Field trips per student: \$400 Venue fees per student: \$200
Explanatory Notes	Based on the actual costs for the 4-week Belgrade 2015 course extrapolated to the 6-week version planned for 2016.

### Routing (For Mandatory Student Instructional Support Fees and Non-Instructional Fees)

Consultative Route (parties who have seen the proposal prior to Registrar's Advisory Committee on Fees and in what capacity)	Tim Khaner (Assistant Chair Administration, Anthropology), Pamela Willoughby (Chair, Anthropology), Anna Vocioni (Special Sessions), Robin Cowan (Senior Officer, Student Programs & Services, Arts), Zhi Jones, Associate Director, Education Abroad, University of Alberta International
Student Group Consultative Route	University of Alberta Anthropology Undergrads (UAAU)
Advisory Route (RACF) Include dates	October 20, 2015

Approval Route* (Governance) *The approval process is initiated in January for the next academic year	GFC Academic Planning Committee (APC) Board Finance and Property Committee (BFPC) Board of Governors (BG)
Final Approver	Board of Governors

**Attachments** N/A

## Registrar's Advisory Committee on Fees (RACF)

For the meeting of:

Item No. < >

### Request for Field School fee for PLAN 599 (Optional Course in new Masters of Urban and Regional Planning)

**Fee Type (see end of form for definitions)\*:**

- Mandatory Student Instructional Support Fee**
- Alternate Delivery Fee**
- Cost Recovery Fee / Revenue Generation**
- Other**

**OUTLINE OF ISSUE:** Proposal for a Field Course fee for the proposed Master of Science in Urban and Regional Planning. This course will be an optional course in the program and may operate in conjunction with the current field school - HGP 499/599.

*Put N/A in any boxes that do not apply*

#### Proposer

Faculty/Department	Faculty of Science / Earth and Atmospheric Sciences
Dean/Chair	Jonathan Schaeffer / Rob Creaser
Primary Contact (Name, phone number, and e-mail)	Sandeep Agrawal, 780-492-1230, sagrawal@ualberta.ca
Secondary Contact (Name, phone number, and e-mail)	Bob Summers, 780-492-0342, Robert.summers@ualberta.ca

#### Item

Purpose of Fee (what it is to be used for)	The fee will be for a field school course (PLAN 599) and will be used to cover expenses of operating the course (lodging, travel, etc).
Proposed Amount	\$1000.00 to \$3500.00 (Depending on location of field school)
Previous Fee Amount (if this is a new fee, please indicate that here)	New Fee
Requested Implementation Date	September, 2016 (Proposed Start of Planning Program)
The Impact of the Fee (number of students affected, etc.)	Option available for up to 20 students per year. Expected number of students enrolling in field school is 1-5 per year.
Collected Centrally or by Department	Department



**Course Information (if fee is attached to a course)**

Course Name(s)	
Required Course(s)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
The course/program is on or off campus	<input type="checkbox"/> On-Campus <input checked="" type="checkbox"/> Off-Campus (part of on campus program though)
New or Existing Course(s)	New (though will run concurrent with HGP 499)
New or Existing Program (include name)	Masters of Science in Urban and Regional Planning Course: PLAN 599 Advanced Practical Field Study in Planning
Course Description(s)	Intensive field or practical study in Planning, typically as part of a team working off-campus. Details and areas of study may vary from year to year; consult the department about current offerings, fees and timing. This course may require the payment of additional fees.

**Details**

Estimated Costs (Budget information may be included here or as an attachment)	Costs will vary each year depending on the location of the field school.
Explanatory Notes	

**Routing (For Mandatory Student Instructional Support Fees and Non-Instructional Fees)**

Consultative Route (parties who have seen the proposal prior to Registrar's Advisory Committee on Fees and in what capacity)	EAS Chair, (letter attached) Dean of Science, (email note attached)
Student Group Consultative Route	
Advisory Route (RACF) Include dates	
Approval Route* (Governance) *The approval process is initiated in January for the next academic year	GFC Academic Planning Committee Board Finance and Property Committee (BFPC) Board of Governors (BG)
Final Approver	Board of Governors

## Routing (For Cost Recovery, Revenue Generation, and Alternate Delivery)

Which Exclusion of the Tuition Fee Regulation does this meet:	<input type="checkbox"/> Course taken as part of a distance delivery program by individuals who do not reside in Alberta <input type="checkbox"/> Apprenticeship program under the Apprenticeship and Industry Training Act <input type="checkbox"/> Off-campus cost recovery instruction programs <input type="checkbox"/> Courses provided under third party contract <input type="checkbox"/> Any differential or surcharge in fees that the board of the institution may set for courses taken by individuals who are not Canadian citizens or permanent residents of Canada
Consultative Route (parties who have seen the proposal prior to Registrar's Advisory Committee on Fees and in what capacity)	
Student Group Consultative Route	
Advisory Route (RACF) Include dates	
Approval Route* (Governance)	
Final Approver	

### Attachments

1. Support letter from the Chair of Earth and Atmospheric Sciences
2. Support note from the Dean of Science
3. Sample budgets



26 November 2015

Registrar's Advisory Committee on Fees (RACF)  
Office of the Registrar  
Administration Building  
University of Alberta

To Whom It May Concern:

**Re: Mandatory Student Instructional Support Fee (MSISF) - PLAN 599**

As Acting Chair, Department of Earth and Atmospheric Sciences, I fully support and recommend approval and implementation of the proposed mandatory student instructional support fee for the optional field school course, PLAN 599, to be offered in the new Master of Science in Urban and Regional Planning program.

Sincerely,

Dr. Robert A. Creaser, FRSC  
Professor, Canada Research Chair (Isotopic Geochemistry) and  
Acting Chair, Department of Earth and Atmospheric Sciences

copy: Dr. Sandeep Agrawal, Professor & Director, Planning Program  
Department of Earth and Atmospheric Sciences

**From:** [Jonathan Schaeffer](#)  
**To:** [Sandeep Agrawal](#)  
**Cc:** [Robert A Creaser](#); [Robert Summers](#)  
**Subject:** Re: Non Instructional Course fees.  
**Date:** November-29-15 7:06:42 PM

---

Thank you for doing this. I support the initiative. Is an email sufficient, or do you need something on letterhead?

--

Jonathan Schaeffer  
Dean, Faculty of Science, University of Alberta  
Phone: 780 492-4757  
Email: [dean.science@ualberta.ca](mailto:dean.science@ualberta.ca)  
Blog: <http://www.jonathanschaeffer.blogspot.ca>  
Web: <http://www.cs.ualberta.ca/~jonathan>

On Tue, Nov 24, 2015 at 5:14 PM, Sandeep Agrawal <[sagrawal@ualberta.ca](mailto:sagrawal@ualberta.ca)> wrote:

Dear Jonathan and Rob,

Attached please find the outline of issue for a request to add a mandatory instructional fee to the cost recovery course PLAN 599, which is a field school course in the new MSc in Planning.

The fee has been approved today by RACF. The committee was very supportive of the mandatory fee added to the cost recovery portion of the course. However, they need a letter of support from each of you before it moves to the next stage of approval i.e. APC. It will be great if you could do a short letter, if of course, you are supportive of such a fee.

The Registrar's office would need the letters by next week.

Thank you.

Sandeep

Sandeep Agrawal, PhD, AICP, MCIP | Professor & Inaugural Director, Planning Program, EAS | 3-107 Tory, Urban Environment Observatory, University of Alberta, Canada | Ph [780-492-1230](tel:780-492-1230)

**Faculty of Science**  
Office of the Dean  
6-189 Centennial Centre for Interdisciplinary Science (CCIS)  
Edmonton, Alberta, Canada T6G 2E1

Tel: 780.492.4757  
Fax: 780.492.9434  
dean.science@ualberta.ca  
www.science.ualberta.ca

Date: December 4, 2015

To: Registrar's Advisory Committee on Fees  
Office of the Registrar

From: Jonathan Schaeffer, Dean  
Faculty of Science

Cc: Sandeep Agrawal, Director, Planning Program  
Department of Earth and Atmospheric Sciences

Re: **Mandatory Student Instructional Support Fee (MSISF) – PLAN 599**

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I would like to lend my strongest support to the proposed mandatory student instructional support fee for the field school course, PLAN 599, being offered in the MSc in Urban and Regional Planning. The quality of this course (and, indeed, the program) critically depends on taking the students off campus into settings that provide instructional value that would not be easily recreated in the classroom. These field trips are expensive and the financial burden cannot be borne by the Department/Faculty. The alternative is to eliminate the field component, resulting in a significant degradation in the pedagogical value of the course. The MSc in Urban and Regional Planning will only succeed if it is recognized as a high-quality offering. The Faculty of Science urges RACF to support the proposed mandatory instructional fee for PLAN 599.

Sincerely,



Jonathan Schaeffer  
JS/rb

## Registrar's Advisory Committee on Fees (RACF)

For the meeting of: December 22, 2015

Item No. <02>

**Request for Approval for: Student Instructional Support Fees for test protocols and supplies for the psychological assessments of clients seen by students in EDPY 518: Individual Psychological Assessment: Psycho-Educational Foundations**

**Fee Type (see end of form for definitions)\*:**

- Mandatory Student Instructional Support Fee**
- Alternate Delivery Fee**
- Cost Recovery Fee / Revenue Generation**
- Other**

**OUTLINE OF ISSUE:** EDPY 518 is a required practicum course for the students in the School and Clinical Child Psychology (SCCP) program. The course is an introduction to the theory, principles, and practices of psychological assessment. In addition to the lecture component of the course, the students in EDPY 518 work in the Faculty of Education's Clinical Services to gain clinical experience in working with clients who request or require, via referral, psychological assessment. This clinical experience is developed through the administration of a series of five psychological and assessment tests to three child and/or adolescent clients and the provision of subsequent reports for the clients. The clinical experience for the students is essential in allowing them to practice the theory and principles of psychological testing and to prepare for professional practice.

For each client, the student uses a series of psychological assessment tests, a number of protocols (forms the client is required to complete), and between 200-300 sheets of paper for the consent forms, data, and final reports. The protocols and paper for the reports are single use only while the tests can be applied to multiple clients and are only replaced when updated. The cost of the protocols and paper supplies for the students is \$150/student. This is the amount for which we are applying as the Mandatory Instructional Fees for this course.

*Put N/A in any boxes that do not apply*

### Proposer

Faculty/Department	Faculty of Education / Department of Educational Psychology
Dean/Chair	Dean: Dr. Randolph Wimmer / Chair: Dr. Jacqueline Leighton
Primary Contact (Name, phone number, and e-mail)	Liz Grieve, Assistant Chair (Administration) 2-2606 / grieve@ualberta.ca
Secondary Contact (Name, phone number, and e-mail)	Dr. George Buck, Associate Chair (Graduate Studies) 2-9275 / george.buck@ualberta.ca

**Item**

Purpose of Fee (what it is to be used for)	The fee is to be used to support the costs of psychological test protocols, and supplies used by the students when working with clients.
Proposed Amount	\$150
Previous Fee Amount (if this is a new fee, please indicate that here)	New Fee
Requested Implementation Date	September 1, 2016
The Impact of the Fee (number of students affected, etc.)	Maximum enrollment per section is 20 students. At present we only offer one section per year.
Collected Centrally or by Department	Centrally

**Course Information (if fee is attached to a course)**

Course Name(s)	EDPY 518: Individual Psychological Assessment: Psycho-Educational Foundations
Required Course(s)	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
The course/program is on or off campus	<input checked="" type="checkbox"/> On-Campus <input type="checkbox"/> Off-Campus
New or Existing Course(s)	Existing course
New or Existing Program (include name)	Existing Program: School and Clinical Child Psychology
Course Description(s)	Theory, principles, and practice of psychological assessment. Students will gain clinical experience in working with individuals referred for psychological assessment.

**Details**

Estimated Costs (Budget information may be included here or as an attachment)	\$150 /student (3 clients @ \$50/client)
Explanatory Notes	Students will administer tests/protocols to 3 clients.

**Routing (For Mandatory Student Instructional Support Fees and Non-Instructional Fees)**

Consultative Route (parties who have seen the proposal prior to Registrar's Advisory Committee on Fees and in what capacity)	Dr. Jacqueline Leighton, Chair, Educational Psychology Dr. Lynn McGarvey, Vice-Dean, Education on behalf of the Dean Dr. George Buck, Associate Chair (Graduate Studies), Educational Psychology Dr. Martin Mrazik, Director of Assessment, Clinical Services, Education Faculty members of the School and Clinical Child Psychology program
Student Group Consultative Route	
Advisory Route (RACF) Include dates	RACF December 22, 2015
Approval Route* (Governance) *The approval process is initiated in January for the next academic year	GFC Academic Planning Committee (APC) Board Finance and Property Committee (BFPC) Board of Governors (BG)

**Attachments**

EDPY 518 and 519 have the same attachments and are only presented once. Look for the attachments after the proposal for EDPY 519.

1. Letter of support from the Vice-Dean on behalf of the Dean of Education
2. 2015 Student Plan of Study: Master's Program in School and Clinical Psychology

EDPY 518, EDPY 519, EDPY 543, EDPY 547 all share the following attachment, look for the attachment after the proposal for EDPY 547.

3. Supplementary Material



## Registrar's Advisory Committee on Fees (RACF)

For the meeting of: December 22, 2015

Item No. <03>

**Request for Approval for: Student Instructional Support Fees for test protocols and supplies for the psychological assessments of clients seen by students in EDPY 519: Individual Psychological Assessment: School and Clinical Applications**

**Fee Type (see end of form for definitions)\*:**

- Mandatory Student Instructional Support Fee**
- Alternate Delivery Fee**
- Cost Recovery Fee / Revenue Generation**
- Other**

**OUTLINE OF ISSUE:** EDPY 519 is a required practicum course for the students in the School and Clinical Child Psychology (SCCP) program. The course, EDPY 518, is a continuation of the instruction of the theory, principles, and practice of psychological assessment. In addition to the lecture component of the course, the students in EDPY 519 work in the Faculty of Education's Clinical Services to gain clinical experience in working with clients who request or require, via referral, psychological assessment. This clinical experience is gained through the administration of series of psychological and assessment tests to seven clients – children, adolescents, and adults – and the provision of subsequent reports for the clients. In this course, the students work with nine tests and administer them in various combinations to their clients, depending upon the client's needs. The clinical experience for the students is essential in allowing them to further practice the theory and principles of psychological testing and to prepare for professional practice.

Over the duration of the course, the student must administer the nine tests between two and seven times as per the requirements of the practicum. For each client, the student uses a battery of psychological assessment tests, a number of protocols (forms the client is required to complete), and between 200 and 300 sheets of paper for the consent forms, data, and final reports. The protocols and paper are single use only, while the tests can be applied to multiple clients and are only replaced when updated. The cost of the protocols and paper supplies the students use in the practicum component of the course is \$325/student. This is the amount for which we are applying as the Mandatory Instructional Fees for the course.

*Put N/A in any boxes that do not apply*

**Proposer**

Faculty/Department	Faculty of Education / Department of Educational Psychology
Dean/Chair	Dean: Dr. Randolph Wimmer / Chair: Dr. Jacqueline Leighton

Primary Contact (Name, phone number, and e-mail)	Liz Grieve, Assistant Chair (Administration) 2-2606 / grieve@ualberta.ca
Secondary Contact (Name, phone number, and e-mail)	Dr. George Buck, Associate Chair (Graduate Studies) 2-9275 / george.buck@ualberta.ca

**Item**

Purpose of Fee (what it is to be used for)	The fee is to be used to support the costs of test protocols and supplies used by the students when working with clients.
Proposed Amount	\$325
Previous Fee Amount (if this is a new fee, please indicate that here)	New Fee
Requested Implementation Date	September 1, 2016
The Impact of the Fee (number of students affected, etc.)	Maximum enrollment per section is 20 students. At present we only offer one section per year.
Collected Centrally or by Department	Centrally

**Course Information (if fee is attached to a course)**

Course Name(s)	EDPY 519: Individual Psychological Assessment: School and Clinical Applications
Required Course(s)	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
The course/program is on or off campus	<input checked="" type="checkbox"/> On-Campus <input type="checkbox"/> Off-Campus
New or Existing Course(s)	Existing course
New or Existing Program (include name)	Existing Program: School and Clinical Child Psychology
Course Description(s)	Theory, principles, and practice of psychological assessment with an emphasis on school and clinical applications. Students will gain school and clinical experience in working with individuals referred for psychological assessment.

**Details**

Estimated Costs (Budget information may be included here or as an attachment)	\$325/student (7 clients @ \$46.43/client)
Explanatory Notes	Students will administer tests/protocols to 6 clients

**Routing (For Mandatory Student Instructional Support Fees and Non-Instructional Fees)**

Consultative Route (parties who have seen the proposal prior to Registrar's Advisory Committee on Fees and in what capacity)	Dr. Jacqueline Leighton, Chair, Educational Psychology Dr. Lynn McGarvey, Vice Dean, Education on behalf of the Dean Dr. George Buck, Associate Chair (Graduate Studies), Educational Psychology Dr. Martin Mrazik, Director of Assessment, Clinical Services, Education Faculty members of the School and Clinical Child Psychology program
Student Group Consultative Route	

Advisory Route (RACF) Include dates	RACF December 22, 2015
Approval Route* (Governance) *The approval process is initiated in January for the next academic year	GFC Academic Planning Committee (APC) Board Finance and Property Committee (BFPC) Board of Governors (BG)
Final Approver	Board of Governors

**Attachments**

EDPY 518 and 519 have the same attachments and are only presented once. Look for the attachments after the proposal for EDPY 519.

1. Letter of support from the Vice-Dean on behalf of the Dean of Education
2. 2015 Student Plan of Study: Master’s Program in School and Clinical Psychology

EDPY 518, EDPY 519, EDPY 543, EDPY 547 all share the following attachment, look for the attachment after the proposal for EDPY 547.

3. Supplementary Material

845 Education South  
11210 – 87 Ave  
Edmonton, Alberta, Canada T6G 2G5  
Tel: 780.492.3751  
Fax: 780.492.0236  
[www.education.ualberta.ca](http://www.education.ualberta.ca)

November 12, 2015

RE: Support for increase in Student Instructional Support Fees for test protocols for EDPY 518, 519, 543, 547

The Faculty of Education supports the increase in student instructional fees in order to recover new costs associated with testing materials and protocols in EDPY 518, 519, 543 and 547. The Department of Educational Psychology has appropriately determined the fees based on the student's actual use with clients and with the department bearing the remaining costs.

Sincerely,



Lynn McGarvey, PhD  
Vice Dean

**2015 STUDENT PLAN OF STUDY  
Master's Program in School and Clinical Child Psychology**

NAME: \_\_\_\_\_ ID#: \_\_\_\_\_

CURRENT ADDRESS: \_\_\_\_\_

POSTAL CODE: \_\_\_\_\_ TELEPHONE NO.: (h) \_\_\_\_\_ (w) \_\_\_\_\_

ADVISOR: \_\_\_\_\_ EMAIL ADDRESS \_\_\_\_\_

Students in this program must complete 36 required course credits, and complete and defend a thesis.

**Note:** Students are responsible for making sure they have all the necessary prerequisites for courses. EDPY 507 has a prerequisite of either EDPY 500 or equivalent (introductory statistics course). If you lack this prerequisite, you need to take EDPY 500 prior to taking EDPY 507.

<b>Required Core Courses—Year 1 *18</b>	<b>Term Taken</b>
<b>Fall Term</b>	
EDPY 507 (3) Measurement Theory I	
EDPY 523 (3) Practice of School & Clinical Child Psychology	
EDPY 536 (3) Ethical and Professional Issues in Psychological Practice	
<b>Winter Term</b>	
EDPY 501 (3) Introduction to Methods of Educational Research	
EDPY 521 (3) Foundations of Psychological Assessment	
EDPY 527 (3P) School & Clinical Based Intervention	
<b>Required Core Courses—Year 2 *18</b>	
<b>Fall Term</b>	
EDPY 505 (3) Quantitative Methods I	
EDPY 518 (3P) Individual Psychological Assessment	
EDPY 517 (3) Adolescent/Child Development Theories and Issues	
<b>Winter Term</b>	
EDPY 519 (3P) Individual Psychological Assessment	
EDPY 614 (3) Social & Emotional Development	
EDPY 597 (3) Foundations of Child & Adolescent Intervention	
<b>Additional Course Credits (if applicable)</b>	
FGSR Ethics Requirement Website: <a href="http://gradfile.fgsro.ualberta.ca/degreesuperv/index.htm">http://gradfile.fgsro.ualberta.ca/degreesuperv/index.htm</a>	

**Thesis**

**Transfer Credit (transferable courses not credited towards another degree)**

Course No.	Wt	Title	Taken at	Year
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

\_\_\_\_\_

Date of Initial Planning

\_\_\_\_\_

Approval of Advisor

\_\_\_\_\_

Student Signature

**Revisions (All revisions to original plan are to be documented on Program Revision forms.)**

Added Courses

\_\_\_\_\_

Deleted Courses

\_\_\_\_\_

The information requested on this form is collected under the authority of Section 33(c) of the Alberta *Freedom of Information and Protection of Privacy Act* for the purpose of documenting students' progression through the Doctoral program in Psychological Studies in Education in the Department of Educational Psychology. Questions regarding the collection or use of this information should be addressed to the Associate Chair, Department of Educational Psychology, Faculty of Education, Room 6-102 Education North, University of Alberta, Edmonton, AB, T6G 2G5 Phone: (780) 492-5245 Fax: (780) 492-1318.

## Registrar's Advisory Committee on Fees (RACF)

For the meeting of: December 22, 2015

Item No. <04>

### Request for Approval for: Student Instructional Support Fees for mental health test applications of clients seen by students in EDPY 543: Mental Health Testing in Counselling

#### Fee Type (see end of form for definitions)\*:

- Mandatory Student Instructional Support Fee**
- Alternate Delivery Fee**
- Cost Recovery Fee / Revenue Generation**
- Other**

**OUTLINE OF ISSUE:** EDPY 543 is restricted to students in the Counselling Psychology program, for whom it is required, and students in the School and Clinical Child Psychology professional programs. This practicum course is an introduction to the theory, research, and practice of mental health testing of adolescent and adult clients. In addition to the lecture component of the course, the students in EDPY 543 work in the Faculty of Education's Clinical Services to gain practical and technical assessment and testing experience, across a wide range of mental health tests. This clinical experience is developed through the administration of a series of mental health tests to themselves and three clients, as well as providing the subsequent reports. The clinical experience for the students is essential in allowing them to practice the theory and principles of mental health testing and to prepare for professional practice.

For each client, the student administers a series of mental health tests based on the needs of the client. At present, the test administration is either online or hard copy, and the clinic is charged per usage. The cost of the test usage for the students to gain practical experience is \$480/student. This is the amount for which we are applying as the Mandatory Instructional Fees for this course.

A calendar change for the new course EDPY 543 is in process and should be implemented in the 2016-17 academic year. At present this course is being offered as an EDPY 597 Special Seminar.

*Put N/A in any boxes that do not apply*

#### Proposer

Faculty/Department	Faculty of Education / Department of educational Psychology
Dean/Chair	Dean: Dr. Randolph Wimmer / Chair: Dr. Jacqueline Leighton
Primary Contact (Name, phone number, and e-mail)	Liz Grieve, Assistant Chair (Administration) 2-2606 / grieve@ualberta.ca
Secondary Contact (Name, phone number, and e-mail)	Dr. George Buck, Associate Chair (Graduate Studies) 2-9725 / george.buck@ualberta.ca

**Item**

Purpose of Fee (what it is to be used for)	The fee is to be used to support the costs of test applications used by the students when working with clients.
Proposed Amount	\$480
Previous Fee Amount (if this is a new fee, please indicate that here)	New Fee
Requested Implementation Date	September 1, 2016
The Impact of the Fee (number of students affected, etc.)	Maximum enrollment per section is 15 students. At present we only offer one section per year.
Collected Centrally or by Department	Centrally

**Course Information (if fee is attached to a course)**

Course Name(s)	EDPY 543: Mental Health Testing in Counselling
Required Course(s)	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
The course/program is on or off campus	<input checked="" type="checkbox"/> On-Campus <input type="checkbox"/> Off-Campus
New or Existing Course(s)	New Course
New or Existing Program (include name)	Existing program: Counselling Psychology
Course Description(s)	Theory, research, and practice regarding mental health testing of adolescent and adult clients. Students will gain practical and technical assessment and testing experience, across a wide range of mental health tests, including personality, career, and general screening measures.

**Details**

Estimated Costs (Budget information may be included here or as an attachment)	\$480/student (3 clients plus one self-administration @ \$120/client)
Explanatory Notes	The students will administer online psychological tests to 3 clients each as well as to themselves at the cost of approximately \$120 per administration

**Routing (For Mandatory Student Instructional Support Fees and Non-Instructional Fees)**

Consultative Route (parties who have seen the proposal prior to Registrar's Advisory Committee on Fees and in what capacity)	Dr. Jacqueline Leighton, Chair, Educational Psychology Dr. Lynn McGarvey, Vice-Dean, Education on behalf of the Dean Dr. George Buck, Associate Chair (Graduate Studies), Educational Psychology Dr. William Whelton, Director of, Counselling, Clinical Services, Education Faculty members of the Counselling Psychology program
Student Group Consultative Route	
Advisory Route (RACF) Include dates	RACF December 22, 2015

Approval Route* (Governance) *The approval process is initiated in January for the next academic year	GFC Academic Planning Committee (APC) Board Finance and Property Committee (BFPC) Board of Governors (BG)
Final Approver	Board of Governors

## Attachments

EDPY 543 and 547 have the same attachments and are only presented once. Look for the attachments after the proposal for EDPY 547.

1. Letter of support from the Vice-Dean on behalf of the Dean of Education
2. Student Plan of Study: Master's Program in Counselling Psychology, Thesis-Based Cohort
3. Student Plan of Study: Master's Program in Counselling Psychology, Course-Based Cohort

EDPY 518, EDPY 519, EDPY 543, EDPY 547 all share the following attachment, look for the attachment after the proposal for EDPY 547.

4. Supplementary Material



## Registrar's Advisory Committee on Fees (RACF)

For the meeting of: December 22, 2015

Item No. <05>

**Request for Approval for: Student Instructional Support Fees for client test applications for the psychological testing and assessment of clients seen by students in EDPY 547: Therapeutic Assessment**

**Fee Type (see end of form for definitions)\*:**

- Mandatory Student Instructional Support Fee**
- Alternate Delivery Fee**
- Cost Recovery Fee / Revenue Generation**
- Other**

**OUTLINE OF ISSUE:** EDPY 547 is an optional practicum course restricted to the students in the Counselling Psychology and the School and Clinical Child Psychology professional programs. The course is a continuation of EDPY 543 with instruction in the theory, research, and practice of therapeutic assessment of adolescent and adult clients. In addition to the lecture component of the course, the students in EDPY 547 work in the Faculty of Education's Clinical Services to gain practical and technical assessment, consultation, and testing experience, particularly regarding collaborative approaches that act as therapeutic interventions in and of themselves. This clinical experience is developed, in part, through the administration of a series of psychological tests to three clients, as well as through the provision of subsequent reports. The clinical experience for the students is essential in allowing them to practice the theory and principles of therapeutic assessment and to prepare for professional practice.

For each client, the student administers a series of psychological tests based on the needs of the client. At present, the test administration is either online or hardcopy, and the clinic is charged per usage. The cost of the test usage for the students to gain practical experience is \$395/student. This is the amount for which we are applying as the Mandatory Instructional Fees for this course.

A calendar change for the new course EDPY 547 is in process and should be implemented in the 2016-17 academic year. At present this course is being offered as an EDPY 597 Special Seminar.

*Put N/A in any boxes that do not apply*

### Proposer

Faculty/Department	Faculty of Education / Department of Educational Psychology
Dean/Chair	Dean: Dr. Randolph Wimmer / Chair: Dr. Jacqueline Leighton
Primary Contact (Name, phone number, and e-mail)	Liz Grieve, Assistant Chair (Administration) 2-2606 / grieve@ualberta.ca

Secondary Contact (Name, phone number, and e-mail)	Dr. George Buck, Associate Chair (Graduate Studies) 2-9275 / george.buck@ualberta.ca
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### Item

Purpose of Fee (what it is to be used for)	The fee will support the costs of test applications used by the student when working with clients.
Proposed Amount	\$395
Previous Fee Amount (if this is a new fee, please indicate that here)	New Fee
Requested Implementation Date	September 1, 2016
The Impact of the Fee (number of students affected, etc.)	Maximum enrollment per section is 15 students. At present we only offer one section per year
Collected Centrally or by Department	Centrally

### Course Information (if fee is attached to a course)

Course Name(s)	EDPY 547: Therapeutic Assessment
Required Course(s)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
The course/program is on or off campus	<input checked="" type="checkbox"/> On-Campus <input type="checkbox"/> Off-Campus
New or Existing Course(s)	New Course
New or Existing Program (include name)	Existing Program: Counselling Psychology
Course Description(s)	Theory, research, and practice regarding therapeutic assessment. Students will gain practical and technical assessment, consultation, and testing experience with adolescent and adult clients, particularly regarding collaborative approaches that act as therapeutic interventions in and of themselves.

### Details

Estimated Costs (Budget information may be included here or as an attachment)	\$395/student (3 clients @ \$131.67/client)
Explanatory Notes	Students will administer online psychological tests to 3 clients

### Routing (For Mandatory Student Instructional Support Fees and Non-Instructional Fees)

Consultative Route (parties who have seen the proposal prior to Registrar's Advisory Committee on Fees and in what capacity)	Dr. Jacqueline Leighton, Chair, Educational Psychology Dr. Lynn McGarvey, Vice-Dean Education on behalf of the Dean Dr. George Buck, Associate Chair (Graduate Studies), Educational Psychology Dr. William Whelton, Director of Counselling, Clinical Services, Education Faculty members of the Counselling Psychology program
Student Group Consultative Route	
Advisory Route (RACF) Include dates	RACF December 22, 2015

Approval Route* (Governance) *The approval process is initiated in January for the next academic year	GFC Academic Planning Committee (APC) Board Finance and Property Committee (BFPC) Board of Governors (BG)
Final Approver	Board of Governors

EDPY 543 and 547 have the same attachments and are only presented once. Look for the attachments after the proposal for EDPY 547.

1. Letter of support from the Vice-Dean on behalf of the Dean of Education
2. Student Plan of Study: Master's Program in Counselling Psychology, Thesis-Based Cohort
3. Student Plan of Study: Master's Program in Counselling Psychology, Course-Based Cohort

EDPY 518, EDPY 519, EDPY 543, EDPY 547 all share the following attachment, look for the attachment after the proposal for EDPY 547.

4. Supplementary Material

845 Education South  
11210 – 87 Ave  
Edmonton, Alberta, Canada T6G 2G5  
Tel: 780.492.3751  
Fax: 780.492.0236  
[www.education.ualberta.ca](http://www.education.ualberta.ca)

November 12, 2015

RE: Support for increase in Student Instructional Support Fees for test protocols for EDPY 518, 519, 543, 547

The Faculty of Education supports the increase in student instructional fees in order to recover new costs associated with testing materials and protocols in EDPY 518, 519, 543 and 547. The Department of Educational Psychology has appropriately determined the fees based on the student's actual use with clients and with the department bearing the remaining costs.

Sincerely,



Lynn McGarvey, PhD  
Vice Dean

Student Plan of Study

Master's Program in Counselling Psychology, Thesis-Based Cohort

Name: \_\_\_\_\_ ID#: \_\_\_\_\_

Current address: \_\_\_\_\_

Postal Code: \_\_\_\_\_ Telephone: (h) \_\_\_\_\_ (w) \_\_\_\_\_

Advisor: \_\_\_\_\_ Email address: \_\_\_\_\_

FGSR Ethics Requirement Web CT EDPY 501  
 Accessed at: <http://www.mdt.tuclcs.uaJberta.caldcmlllJICfYfethicsljndc;x.l!tm>

Students in a master's program must register once each 12 months to keep their programs active.

		Credit	Taken
Year 1:			
Fall/Winter			
Required 18 credits	EDPY 501	3 er	_____
	EDPY 532	3 er	_____
	EDPY 533	3 er	_____
	EDPY 534	3 er	_____
	EDPY 536	3 er	_____
Required Research Course (e.g., EdPy 503, SOS)	_____	3 er	_____
Spring			
Required 3 credits	EDPY 521	3 er	_____
Year 2:			
Fall/Winter			
Required 15 credits	EDPY 518	3 er	_____
	EDPY 538	3 er	_____
	EDPY 543	3 cr	_____
(Thesis credits)	THES906	6 cr	_____
Recommended Optional Course 1 (e.g., EDPY 510, S42, 546)	_____	3 er	_____

Total (*minimum*) required for completion of master's degree: 36 credits

Advanced Credit (Tnnsfenble counes which have oot been credited towards another dei!"")

Course No.	Wt	Title	Taken at	Year
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

\_\_\_\_\_  
 Date of Initial Planning      Approval of Advisor      Student Signature

Revisions:  
 All revisions to original plan arc to be documented on Program ReviJion fonn's.  
 Added Courses      Deleted Courses

\_\_\_\_\_

The personal information requested on this form is collected under the authority of Section 33(c) of the Alberta Freedom of Information and Protection of Privacy Act for the purpose of documenting students' progress through the Master's program in Counselling Psychology in the Department of Educational Psychology. Questions regarding the collection, use or disposal of this information should be addressed to the Associate Chair, Department of Educational Psychology, Faculty of Education, Room 6-163 Education North, University of Alberta, Edmonton, AB, T6G 2G5 Phone: (780) 493-3243 Fax: (780) 493-1318 August 2015

It helps maintain full-time status, which is 9 credits/term, strengthen CAP credcotil's, and enhance training; as a masten-level psychologist.

Student Plan of Study

Master's Program in Counselling Psychology, Course-Based Cohort

Name: \_\_\_\_\_ ID#: \_\_\_\_\_

Current address: \_\_\_\_\_

Postal Code: \_\_\_\_\_ Telephone : (h) \_\_\_\_\_ (w) \_\_\_\_\_

Advisor: \_\_\_\_\_ Email address \_\_\_\_\_

FGSR Ethics Requirement Web CT EDPY 501 \_\_\_\_\_  
 Accessed -http{www.gradstudjcs.ua!bsrta.caldcgresupmlctbjcs/indcg. htm

Students in a master's program must register once each 12 months to keep their programs active.

	Course	Cr	Taken
<b>Year 1:</b>			
Fall/Winter			
Required 18 credits	EDPY 501	3 er	_____
	EDPY 532	3 er	_____
	EDPY 533	3 er	_____
	EDPY 534	3 er	_____
	EDPY 536	3 er	_____
	EDPY 542	3 er	_____
Spring			
Required 3 credits	EDPY 521	3 er	_____
<b>Year 2: Fall/Winter</b>			
Required 15 credits	EDPY 518	3 er	_____
	EDPY 538	3 er	_____
Required Optional Course (e.g., 510, 640)	_____	3 er	_____
	EDPY 543	3 er	_____
(Capping Project)	EDPY 903	3 er	_____
Recommended Optional Course 1 (e.g., EDPY 546)	_____	3 er	_____

Total (minimum) required for completion of master's degree: 36 credits

Advanced Credit (Courses which have not been credited towards another degree)

Course No.	Wt	Title	Taken at	Year
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

\_\_\_\_\_ Date of Initial Planning Approval of Advisor Student Signature

Revisions:  
 All revisions to original plan are to be documented on Program Revision forms.  
 Added Courses Deleted Courses

\_\_\_\_\_  
 \_\_\_\_\_

The personal information requested on this form is collected under the authority of Section 33(c) of the Alberta Freedom of Information and Protection of Privacy Act for the purpose of documenting students' progression through the Master's program in Counselling Psychology in the Department of Educational Psychology. Questions regarding the collection, use or disposal of this information should be addressed to the Associate Chair, Department of Educational Psychology, Faculty of Education, Room 6-163 Education North, University of Alberta, Edmonton, AB, T6G 2G3 Phone: (780) 493-3243 Fax: (780) 493-1318. August 2013

Helps maintain full-time status, which is necessary to strengthen CAP and enhance training of masters-level psychologist

**SUPPLEMENTARY MATERIALS**  
**For application for Mandatory Instructional Fees**  
**From Educational Psychology**

- A. Background
- B. Consultation with students
- C. Maximum Cost to Students in Each Program
- D. Education Clinic Fee Information 2015 - Fee Scale
- E. Education Clinic Fee Information 2015 - Fee Revenues 2015
- F. Client Fees and Student Fees

## BACKGROUND

Prior to the Fall term 2015, the Educational Psychology department offered a full year course, EDPY 545 Individual Psychological Assessment to the School Psychology and Counselling Psychology students. While required for students in School Psychology, students in the Counselling Psychology program sometimes took the course as an option. Mandatory Instructional Fees of \$100/student were attached to this course for tests/protocols.

With a restructure of the School Psychology program into School and Clinical Child Psychology (SCCP) and with requirements for the Counselling Psychology program to stay current with CPA accreditation requirements, EDPY 545 was replaced with four half courses, EDPY 518 and EDPY 519 with priority given to students in the SCCP program, and EDPY 543 and EDPY 547 with priority given to students in the Counselling Psychology program. The new courses better meet the needs of the students in preparing them for their professions in their respective areas.

This program restructure also responded to the request of students in the Counselling Psychology program for a testing course that provided them with testing opportunities more closely aligned with their area of study and profession, as well as the need of their clients.

Students in the SCCP program are only required to take EDPY 518 and EDPY 519. Students in the Counselling Psychology program are only required to take EDPY 543. EDPY 547 is an option for them.

Since the application for the Mandatory Instructional Fees for EDPY 545 was approved, the course content had changed and the costs of tests/protocols has increased. The current applications for EDPY 518, 519, 543, and 547 reflects the costs of those items at present.

There is a precedent for Mandatory Instructional Fees for test/protocols for courses in the Educational Psychology professional programs. As mentioned above, EDPY 545 had fees of \$100/student attached to it for several years

EDPY 521 Foundations of Psychological Assessment, a longstanding course in the department, also has Mandatory Instructional Fees of \$100/student for tests/protocols. It is a required course for students in the SCCP program. Because the fees were approved many years ago, we did review them to see if a revised application was in order; however, the current fee amount is still appropriate for that course.



Consultation with students,  
conducted by Dr. G.H. Buck

I have consulted with students from the time the new courses were first proposed, and additionally, I consulted with students and recent graduates specifically concerning the proposed increases in costs. First of all, students that I communicated with all were strongly in favour of the increased use of test materials and protocols, and the initiative of both the School and Clinical Child Psychology (SCCP) program and the Counselling Psychology program to improve the content and quality of the programs, and in the case of SCCP, to obtain accreditation. In fact, a common thread expressed by students in the SCCP program was that they wanted to delay graduation in order that they may graduate from an accredited program, rather than from a program engaged in the process of seeking accreditation. Clearly, students want and support the initiative for accreditation. Indeed, several students (some in SCCP, and others in Counselling) remarked that they chose the University of Alberta to pursue their studies because the programs were either accredited, or are soon to be accredited.

The matter of increased fees received mixed responses. Some students, and one former student, contended that since clients are charged to attend the Education Clinic, then any costs should be passed onto them, and not to students. However, when it was explained that the Clinic is intended to serve individuals who might not otherwise be able to afford Counselling services, and that the funds collected from clients are used to defray ongoing capital costs, some students withdrew their criticisms. Nevertheless, there are a few students who maintain that because they believe that tuition fees are "high enough", and should cover all expenses, save textbooks, then any supplemental fees should be eliminated. A majority of students and graduates expressed support for increased supplemental fees provided that such fees were used strictly to maintain and enhance quality of instruction for students. One student, for example, stated, "I support these changes and believe they are necessary to provide the best educational and clinical experiences for current students." Another student stated, "I would happily pay an increase in program fee in order to receive the best training and experience possible." Such sentiments were also expressed by recent graduates. For example, one graduate wrote, "if I were a student ... again, and had to choose between 1) paying the extra cost to do assessments on 'real' clients, or 2) not paying the fees and only practicing on my classmates, ... I would definitely choose to pay the extra fees." Although support for the increased fees was not unanimous, most students and graduates realize that to provide the best quality of instruction possible, such fees are necessary.

**Maximum Cost to Students in Each Program  
2015-16**

<Item C>

*Parameters: Estimated 2 yr. completion  
Calculations based on 2015-16 rates; no increases built in  
Students can opt out of some non-instructional fees  
Calculations reflect rates for Canadian students*

**MEd in School and Clinical Child Psychology**

Tuition	7,489.44
Max. Non-Instructional Fees	3,437.56
Instructional Fees EDPY 521	100.00
<b>Current Program Cost</b>	<b>11,027.00</b>
Proposed Instructional Fees	475.00
<b>Projected Program Cost</b>	<b>11,502.00</b>

**MEd in Counselling Psychology (Thesis-based)**

Tuition	7,948.92
Max. Non-Instructional Fees	3,749.60
Instructional Fees EDPY 521	100.00
<b>Current Program Cost</b>	<b>11,798.52</b>
Proposed Instructional Fees *	875.00
<b>Projected Program Cost</b>	<b>12,673.52</b>

**MEd in Counselling Psychology (Course-based)**

Tuition	8,113.56
Max. Non-Instructional Fees	3,437.56
Instructional Fees EDPY 521	100.00
<b>Current Program Cost</b>	<b>11,651.12</b>
Proposed Instructional Fees *	875.00
<b>Projected Program Cost</b>	<b>12,526.12</b>

*\* Includes Instructional fees of \$395/student  
for EDPY 547, which is an optional course*

		Education Clinic Fee Information 2015		<Item D>
<b>SERVICE FEE SCALE</b>				
<b>TYPE of SERVICE</b>	<b>*FEE</b>	<b>STUDENT PROGRAM NOTES</b>		
Counseling sessions:	\$250 per year	Counseling	Average # of sessions/client = 13	
Vocational Testing	\$250 per year	Counseling & SCCP	Average of 2-3 tests & 4-6 sessions/client	
Assesement	\$500		Average 7 hours of testing & 3 hours interview/client	
<b>*NOTE: Clients with reduced financial resources may be able to apply for a fee reduction</b>				

Education Clinic Fee Information 2015					<Item E>
<b>FEE REVENUES FALL 2015</b>					
<b>COURSE</b>	<b>TYPE OF CLIENT</b>	<b># OF CLIENTS</b>	<b>FEE PAID</b>	<b>TOTAL</b>	
EDPY 518	Full Fee	30	\$500	\$15,000	EDPY 518
*EDPY 543	Full Fee	25	\$250	\$6,250	
	UAlberta Students	6	\$100	\$600	
	Waived Fees	2	Total = \$500		Lost revenue
			TOTAL	\$6,850	EDPY 543
<i>* Ran as EDPY 597 special seminar while waiting for calendar change</i>					
<b>CLIENT REVENUES WINTER 2015</b>					
<b>COURSE</b>	<b>TYPE OF CLIENT</b>	<b># OF CLIENTS</b>	<b>FEE PAID</b>	<b>TOTAL</b>	
*EDPY 545 2nd Term	Full Fee	53	\$500	\$26,500	Comparable to EDPY 519
	Reduced Fee	3	Various	\$412	
	School Assessments	21	\$250	\$3,000	
	Waived Fees	4	Total = \$2000		Lost revenue
				\$29,912	
<i>*EDPY 545 was a full term course for SCCP and Counselling students. It has been discontinued. Please see discussion on precedents for full information</i>					
<b>**EDPY 547</b>					
	Full Fee	37	\$250	\$9,250	
	UAlberta Students	7	\$100	\$700	
	Reduced Fee	4	various	\$375	
	Waived Fees	6	Total = \$3000		Lost revenue
				\$10,325	
<i>**Ran as EDPY 597 special seminar while waiting for calendar change</i>					

**CLIENT FEES AND STUDENT FEES**

<b>COURSE</b>	<b>MAX # OF CLIENTS</b>	<b>MAX # OF STUDENTS</b>	<b>MAXIMUM GROSS REVENUE CLIENT FEES</b>	<b>MAXIMUM REVENUE STUDENT FEES</b>	<b>COST OF PROTOCOLS</b>
EDPY 518	60	20	\$30,000	\$3,000	\$3,000
EDPY 519	140	20	\$70,000	\$6,500	\$6,500
EDPY 543	45	15	\$11,250	\$7,200	\$7,200
EDPY 547	45	15	\$11,250	\$5,925	\$5,925
<b>TOTAL</b>	<b>290</b>	<b>70</b>	<b>\$122,500</b>	<b>\$22,265</b>	<b>\$22,265</b>

The table above reflects a scenario where all the courses were fully enrolled and all the clients seen paid the full fee. This is rarely the case. The table also only reflects the cost of the protocols, the expense that would be covered by the student fees. It does not take into consideration other required expenses directly related to the client visits - expenses that facilitate the students' ability to study their sessions as well as the installation of proper and comfortable interview rooms for the clients.

The protocols have an originating test instrument, which must be purchased in order for the test to be administered. While protocols are consumables and ordered annually, the test instruments are replaced approximately every 5 years. The cost for the test instruments used in these four courses is \$76,065.

The clinic supplies 14 tablet computers that are installed in the client interview rooms so the students can record their sessions. Recording of sessions is a requirement. The tablets need to be replaced every 3-5 years and their cost totals approximately \$14,000.

The clinic has 3 dedicated scoring computers set up specifically to score tests and assessments they have administered to clients, and to store the results securely. Additionally, there is one dedicated printer for the scoring computers. It is required for the protection of client privacy that the aforementioned computers and printer are used only for test scoring purposes. The computers also require special software for the scoring. These computers are replaced approximately every 5 years at a total cost of approximately \$7500. The printer may have a longer life; however, the toner requires frequent toner replenishment.

For the four courses in this application, the clinic supplies 4 laptop computers to the students to use for their test administrations. This is particularly necessary for the

tests in EDPY 543 and 547, which are accessible primarily online. In a test administration, the client uses one laptop while the student practitioner uses the other. These laptops are dedicated to this purpose, again for client privacy protection. The laptops are replaced approximately every 5 years for a total cost of approximately \$8000.

The clinic supplies 150 USB memory sticks (thumb drives) for the students to borrow for storing the client sessions for their practicum supervisors to review. The USBs must be of sufficient capacity, and thus cost approximately \$30 per USB. They are replaced approximately 3-4 years for a total cost of \$4500.

The client interview rooms require special furniture – comfortable chairs, tables, lighting – to create an acceptable and comfortable ambience for the clients in session. The clinic is responsible for replacing this furniture, which due to high use, has about a 10-year life.

The client fees support all of the above items. Although it may appear in the table above that the client fees could readily cover the costs of the protocols, when the other items required for client sessions are taken into consideration, they cannot. In the past, the capital items were supported through one time only soft funds from the Faculty office. This is no longer the case, as this funding has been discontinued.

The clinic has a small base budget that primarily covers the salaries for the clinic staff as well as a very small supply budget, which are used for normal administration consumables. Because the clinic brings in revenue, the base budget has a line item for external revenue, where \$20,688 is returned to Central.

Last year the Clinic grossed \$100,703 in external revenue with a net of \$80,015.

## Registrar's Advisory Committee on Fees (RACF)

For the meeting of: January 26, 2016

Item No. <            >

**Request for Approval for: ALES 291, 391, 491**

**Fee Type (see end of form for definitions)\*:**

- Mandatory Student Instructional Support Fee**
- Alternate Delivery Fee**
- Cost Recovery Fee / Revenue Generation**
- Other**

**OUTLINE OF ISSUE:** The fee will be collected for field trips/travel related to the proposed topic for the course. The costs will vary depending on the length of time and location for the travel. The fee will only be levied at a cost recovery level.

*Put N/A in any boxes that do not apply*

### Proposer

Faculty/Department	Agricultural, Life & Environmental Sciences (ALES)
Dean/Chair	Stan Blade
Primary Contact (Name, phone number, and e-mail)	Jim Bohun, 2-1313, <a href="mailto:jbohun@ualberta.ca">jbohun@ualberta.ca</a>
Secondary Contact (Name, phone number, and e-mail)	Francine Hodder, 2-7101

### Item

Purpose of Fee (what it is to be used for)	To cover the cost of travel that may be required from time to time under ALES 291, 391, 491
Proposed Amount	\$0 to \$5000 (to only be charged for field trips or study abroad)
Previous Fee Amount (if this is a new fee, please indicate that here)	New Fee
Requested Implementation Date	Spring/Summer 2016
The Impact of the Fee (number of students affected, etc.)	There is no impact on students, beyond those that are afforded the opportunity to benefit from an optional field trip for credit (E.g. Study tour in Japan).
Collected Centrally or by Department	Collected by Department

### Course Information (if fee is attached to a course)

Course Name(s)	ALES 291: Topics in Agricultural, Life and Environmental Sciences ALES 391: Topics in Agricultural, Life and Environmental Sciences ALES 491: Topics in Agricultural, Life and Environmental Sciences
Required Course(s)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
The course/program is on or off campus	<input type="checkbox"/> On-Campus <input checked="" type="checkbox"/> Off-Campus
New or Existing Course(s)	Existing course
New or Existing Program (include name)	
Course Description(s)	<p>ALES 291: Topics in Agricultural, Life and Environmental Sciences *3-6 (variable) (variable,variable) Offered by various departments depending upon the content of the course in a given year. Sections may be offered in a Cost Recovery format at an increased rate of fee assessment; refer to the Fees Payment Guide in the University Regulations and Information for Students section of the Calendar.</p> <p>ALES 391: Topics in Agricultural, Life and Environmental Sciences *3-6 (variable) (variable,variable) Offered by various departments depending upon the content of the course in a given year.</p> <p>ALES 491: Topics in Agricultural, Life and Environmental Sciences *3-6 (variable) (variable,variable) Offered by various departments depending upon the content of the course in a given year.</p>

### Details

Estimated Costs (Budget information may be included here or as an attachment)	<p>The fee will fluctuate depending on the cost of the trip being proposed. Some topics may require no additional fee, while others may involve relatively high cost due to international travel. The fee will only be levied at a cost recovery level. ALES 291 has been used in the past for an international course (travel to Japan) that received external funding from Alberta Agriculture to cover the students' costs. Now that the external funding has been discontinued, we would like to offer that specific opportunity to students using a Mandatory Student Instructional Support Fee to cover the costs of travel and related expenses (see example 1).</p> <p>Example 1: <b>ALES 291 Field Course in Sustainable Agriculture (Alberta-Hiroshima Exchange)</b></p> <ul style="list-style-type: none"> <li>- International Airfare : \$2000</li> <li>- Program Fee to Hiroshima University (includes accommodation, food and domestic transportation): \$2000</li> <li>- <b>TOTAL: \$4000 per student</b></li> </ul> <p>Example 2: <b>ALES 391 Field Course on Sustainable Rural Communities</b></p> <ul style="list-style-type: none"> <li>- Accommodations per student: \$1500</li> </ul>
---	--



	<ul style="list-style-type: none"> <li>- Food per student: \$150</li> <li>- On-site transportation per student: \$150</li> <li>- Field trips per student: \$400</li> <li>- Venue fees per student: \$200</li> <li>- <b>TOTAL: \$2400</b></li> </ul>
Explanatory Notes	These courses are a topics course that the Faculty might on occasion use to afford students for-credit opportunities that involve travel. All offerings of ALES 291/391/491 are optional and may cover any topic pertaining to any ALES discipline.

**Routing (For Mandatory Student Instructional Support Fees and Non-Instructional Fees)**

Consultative Route (parties who have seen the proposal prior to Registrar's Advisory Committee on Fees and in what capacity)	
Student Group Consultative Route	
Advisory Route (RACF) Include dates	January 26, 2016
Approval Route* (Governance) *The approval process is initiated in January for the next academic year	GFC Academic Planning Committee (APC) Board Finance and Property Committee (BFPC) Board of Governors (BG)
Final Approver	Board of Governors

**Attachment 2**

**Proposal for Deletion of Mandatory Student Instructional Support Fee**

<b>Course</b>	<b>Implementation</b>	<b>Proposed Fee</b>	<b>Page Number</b>
ENGG 404	Retroactive to September 2015	\$0	55

## Registrar's Advisory Committee on Fees (RACF)

For the meeting of: January 26, 2016

Item No. <04>

### Request for Approval for: ENGG 404 Engineering Safety and Loss Management

#### Fee Type (see end of form for definitions)\*:

- Mandatory Student Instructional Support Fee**
- Alternate Delivery Fee**
- Cost Recovery Fee / Revenue Generation**
- Other**

**OUTLINE OF ISSUE:** Current fees in ENGG 404 are for industrial tours, with the large size classes now; the tours are not possible to organize and are being cancelled. Additional fees will therefore no longer be needed. Calendar description of course will be changed to match this change as per the following page

*Put N/A in any boxes that do not apply*

#### Proposer

Faculty/Department	Faculty of Engineering
Dean/Chair	Fraser Forbes
Primary Contact (Name, phone number, and e-mail)	Jason Carey, 492-0501,jpcarey@ualberta.ca
Secondary Contact (Name, phone number, and e-mail)	N/A

#### Item

Purpose of Fee (what it is to be used for)	N/A
Proposed Amount	\$0
Previous Fee Amount (if this is a new fee, please indicate that here)	\$60
Requested Implementation Date	Retroactive to September 2015. The field trip is no longer being offered and the fee was waived for Fall 2015 student registered in this course
The Impact of the Fee (number of students affected, etc.)	N/A
Collected Centrally or by Department	N/A

**Course Information (if fee is attached to a course)**

Course Name(s)	ENGG 404 Engineering Safety and Loss Management
Required Course(s)	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
The course/program is on or off campus	<input checked="" type="checkbox"/> On-Campus <input type="checkbox"/> Off-Campus
New or Existing Course(s)	Existing course
New or Existing Program (include name)	General engineering
Course Description(s)	

**Details**

Estimated Costs (Budget information may be included here or as an attachment)	
Explanatory Notes	

**Routing (For Mandatory Student Instructional Support Fees and Non-Instructional Fees)**

Consultative Route (parties who have seen the proposal prior to Registrar's Advisory Committee on Fees and in what capacity)	
Student Group Consultative Route	
Advisory Route (RACF) Include dates	January 26, 2016
Approval Route* (Governance) *The approval process is initiated in January for the next academic year	GFC Academic Planning Committee (APC) Board Finance and Property Committee (BFPC) Board of Governors (BG)
Final Approver	Board of Governors

**Attachment 4**

**Updated Mandatory Non-Instructional Fee Schedule  
For Informational Purposes Only**

<b>Title</b>	<b>Implementation</b>	<b>Page Number</b>
Mandatory Non-Instructional Fee Schedule	September 2016	63

As per February 2012 Board of Governors meeting, it was requested when new fees are brought forward for approval also included are the updated Mandatory Non-Instructional Fee Schedule for information purposes only

**UNIVERSITY OF ALBERTA**  
**SCHEDULE OF MANDATORY NON-INSTRUCTIONAL FEES 2016-2017**

Mandatory Non-Instructional Fees	2015-2016	2016-2017	See Notes
Athletics and Recreation Fee Fall/Winter Full-time Fall/Winter Part-time Spring/Summer	\$ 82.00 / term † \$ 41.00 / term † \$ 41.00 / term †	\$ 82.00 / term † \$ 41.00 / term † \$ 41.00 / term †	1
CoSSS – Common Student Space, Sustainability and Services Fee Fall/Winter Full-time Fall/Winter Part-time Fall/Winter Off Campus Spring/Summer Spring/Summer Off Campus	\$ 153.08 / term † \$ 76.54 / term † \$ 76.54 / term † \$ 76.54 / term † \$ 38.27 / term †	\$ 153.08 / term † \$ 76.54 / term † \$ 76.54 / term † \$ 76.54 / term † \$ 38.27 / term †	2
Registration and Transcript Fee Fall/Winter Full-time Fall/Winter Part-time Spring/Summer	\$ 76.28 / term † \$ 38.14 / term † \$ 38.14 / term †	\$ 76.28 / term † \$ 38.14 / term † \$ 38.14 / term †	
University Student Services Fee Fall/Winter Full-time Fall/Winter Part-time Spring/Summer	\$ 57.08 / term † \$ 28.54 / term † \$ 28.54 / term †	\$ 57.08 / term † \$ 28.54 / term † \$ 28.54 / term †	
University Health Services Fee Fall/Winter Full-time Fall/Winter Part-time Spring/Summer	\$ 27.06 / term † \$ 13.53 / term † \$ 13.53 / term †	\$ 27.06 / term † \$ 13.53 / term † \$ 13.53 / term †	3

**Notes for Non-instructional Fees**

† Effective June 30, 2015 the Provincial Government mandated all rates remain at the 2014-2015. This schedule contains only mandatory non-instructional fees assessed by the University of Alberta and excludes student levied fees and fees governed by contracts. Examples include, but are not limited to: U-Pass, PAW, SU Health and Dental, GSA.

1. Athletics fee revenue assessed to Augustana students will be directed to the Augustana Athletics program with the exception of Spring/Summer Terms.
2. The CoSSS fee was approved by the Board of Governors at its March 26, 2010 meeting and implemented as of Spring term 2010.
3. Fee will not be assessed for Augustana Faculty students or students taking all courses off-campus.

**Attachment 3**

**New Other Fee**

<b>Course</b>	<b>Implementat ion</b>	<b>Proposed Fee</b>	<b>Page Number</b>
Faculty of Medicine – Supplemental Application Fee	July 1, 2016	\$75	58

## Registrar's Advisory Committee on Fees (RACF)

For the meeting of:  

Item No. <   >

### Request for Approval for: MD Program Supplemental Application Fee

#### Fee Type (see end of form for definitions)\*:

- Mandatory Student Instructional Support Fee**
- Alternate Delivery Fee**
- Cost Recovery Fee / Revenue Generation**
- Other**

#### OUTLINE OF ISSUE:

The primary application fee to the University of Alberta is \$75 for current or former UofA undergraduate students or \$125 for students new to the UofA. Applicants complete a secondary medicine application for which there is currently no additional fee.

The secondary medicine application requirements include the CGPA, MCAT, personal activities and letters of reference. There are about 1600 applicants each year and 480 are selected for interview (**Multiple Mini Interview**) after reviewing the previously noted requirements. The MMI process is also managed within the secondary medicine application. Costs for the secondary medicine application including the MMI are incurred by the Faculty of Medicine & Dentistry. We are incorporating a new metric for evaluation of future applicants. Extra funding resources are required to achieve these ends.

*Put N/A in any boxes that do not apply*

#### Proposer

Faculty/Department	Faculty of Medicine & Dentistry, Undergraduate Medical Education
Dean/Chair	Dr Marc Moreau, Assistant Dean, Admissions
Primary Contact (Name, phone number, and e-mail)	Dr Marc Moreau, 492-9525, mmoreau@ualberta.ca
Secondary Contact (Name, phone number, and e-mail)	Diane Baker, 492-9525, diane.baker@ualberta.ca

#### Item

Purpose of Fee (what it is to be used for)	Secondary Medicine Application, <b>Multiple Mini Interviews</b> , Additional Assessment Tools
Proposed Amount	\$75.00
Previous Fee Amount (if this is a new fee, please indicate that here)	New Fee
Requested Implementation Date	July 1, 2016
The Impact of the Fee (number of students affected, etc.)	1,600 Applicants
Collected Centrally or by Department	Centrally



## Routing (For Mandatory Student Instructional Support Fees and Non-Instructional Fees)

Consultative Route (parties who have seen the proposal prior to Registrar's Advisory Committee on Fees and in what capacity)	Undergraduate Medical Education (UME) Associate/Assistant Deans Meeting; chaired by Associate Dean UME; overall operations of UME, including Admission  MD Program Committee (MDPC); chaired by Associate Dean UME; policy committee for the MD program
Student Group Consultative Route	Medical Students Association (MSA) President
Advisory Route (RACF) Include dates	May 26, 2015
Approval Route* (Governance) *The approval process is initiated in January for the next academic year	GFC Academic Planning Committee (APC) Board Finance and Property Committee (BFPC) Board of Governors (BG)
Final Approver	Board of Governors

## Attachments

- 1 – Secondary Application Fee Proposed Budget
- 2 – MD Program Application Fees Across Canada

**Proposed budget for supplemental application fee:**

**Annual Expense**

Secondary Medicine Application

- *Service Level Agreement to support secondary medicine application* \$ 5,000.00
- *Software development/enhancements* \$15,000.00

Multiple Mini Interviews \$35,000.00

- *480 applicants interviewed over one weekend*
- *160 interviewers, 150 volunteers, 10 staff*
- *Expenses related to coordination and implementation of interviews*

Data Analysis \$30,000.00

Additional Assessment Tools \$35,000.00

- *License fee*

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<b>Total</b>	<b>\$120,000.00</b>
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Cost per applicant	\$75.00
<b>1600 applicants x \$75.00</b>	<b>\$120,000.00</b>

## Application Fees to MD Programs

University	Application Fee	Portion of fees that remain in MD Admissions
University of Alberta	\$75 current or former UofA students <b>or</b> \$125 students new to UofA	
University of British Columbia	\$115.25 for residents of BC with BC transcripts only <b>or</b> \$148.25 for residents of BC with any out of province transcripts <b>or</b> \$170.50 for residents outside of BC . <b>And</b> all applicants pay an additional \$50 upon submission of application.	100%
University of Calgary	\$150	\$50
University of Saskatchewan	\$125	\$125
University of Manitoba	\$90	
McGill University	\$144.37	\$40
Dalhousie University	\$70 <b>and</b> \$75 MMI Interview fee	\$75
Memorial University	\$151.50 application service fee to CaRMS <b>and</b> \$75 to Memorial University	\$75

### Ontario Medical Schools

Ontario Medical Schools Application Service	\$220 application service fee to OMSAS <b>and</b> institutional fee for each ON medical school applied to	
McMaster University	\$125 institutional fee	\$65
Northern Ontario School of Medicine	\$85 institutional fee	\$85
University of Ottawa	\$100 institutional fee	\$75
Queens University	\$100 institutional fee	\$100
University of Toronto	\$110 institutional fee	\$110
University of Western Ontario	\$100 institutional fee	\$100

Sherbrooke	\$81 <b>and</b> \$125 MMI Interview fee*	125*
UMontreal	\$92 <b>and</b> \$125 MMI Interview fee*	125*
Laval	\$78.50 <b>and</b> \$125 MMI Interview fee*	125*

*\*Sherbrooke, UMontreal and Laval do a combined MMI Interview. If an applicant is selected for an interview at more than one school, they complete one MMI Interview and pay the \$125 MMI Interview fee one time.*

**OUTLINE OF ISSUE**

Agenda Title: **University of Alberta’s Comprehensive Institutional Plan (CIP) (2016)**

**Motion:** THAT the GFC Academic Planning Committee recommend to the Board of Governors the *2016 University of Alberta Comprehensive Institutional Plan (CIP)*, as provided by the President’s Executive Committee and as set forth in Attachment 1, with the exception of information pertinent to Ancillary Services’ budgets which is not within the purview of GFC APC to consider and/or recommend, to take effect upon final approval, and to empower administration to make any editorial changes to the CIP, as needed, as long as the changes do not have the force of policy.

**Item**

Action Requested	<input type="checkbox"/> Approval <input checked="" type="checkbox"/> Recommendation <input type="checkbox"/> Discussion/Advice <input type="checkbox"/> Information
Proposed by	President and Vice-Chancellor, David Turpin; Provost and Vice-President (Academic) Steven Dew; Vice-President (University Relations) Debra Pozega Osburn; Vice-President (Finance and Administration) Phyllis Clark; Vice-President (Facilities and Operations) Don Hickey; Vice-President (Advancement) Heather McCaw; and Vice-President (Research) Lorne Babiuk
Presenters	Provost and Vice-President (Academic) Steven Dew; Vice-President (University Relations) Debra Pozega Osburn; Vice-President (Finance and Administration) Phyllis Clark; Vice-President (Facilities and Operations) Don Hickey; Vice-President (Advancement) Heather McCaw; and Vice-President (Research) Lorne Babiuk
Subject	2016 University of Alberta’s Comprehensive Institutional Plan (CIP)

**Details**

Responsibility	President and Vice-Chancellor, Provost and Vice-President (Academic); Vice-President (University Relations); Vice-President (Research); Vice-President (Finance and Administration); and Vice-President (Facilities and Operations)
The Purpose of the Proposal is (please be specific)	Under guidelines from Advanced Education, the University of Alberta has prepared the Comprehensive Institutional Plan (CIP) that incorporates the academy’s goals, initiatives, outcomes and measures with appendices on: budget and financial information; enrolment plan and proposed programming changes; research, applied research and scholarly activities; community outreach and underrepresented learners; internationalization; capital plan; and information technology The CIP is for approval by the Board of Governors and is then filed with the Minister of Innovation and Advanced Education.  The CIP is written in support of the university’s vision and mission, but as the university is in the process of revising its institutional strategic plan, this document reflects the transition. The CIP outlines the university’s priorities, which in turn drives the university’s capital and resource allocation priorities.
The Impact of the Proposal is	To enable the university to move toward fulfilling its vision and mission and to authorize the administration to allocate resources as outlined in the institutional budgets.
Replaces/Revises (eg, policies, resolutions)	CIP 2015

Item No. 6

Timeline/Implementation Date	Fiscal Year 2016-2017
Estimated Cost	See attached documentation for detail
Sources of Funding	See attached documentation for detail
Notes	The 2016/19 CIP Guidelines contain changes to CIP format and content. The main document consists of only four sections that provide a high-level overview of how the university contributes to the government goals of affordability, accessibility and quality. The appendices sections fulfill legislated requirements and provide information requested by Advanced Education. The CIP is a much shorter document than in previous years. The document will be put into its final designed format following Board approval on its content.

**Alignment/Compliance**

Alignment with Guiding Documents	Current institutional planning documents
Compliance with Legislation, Policy and/or Procedure Relevant to the Proposal (please <u>quote</u> legislation and include identifying section numbers)	<p>1. <b>Post-Secondary Learning Act (PSLA)</b> Section 26(1) states:</p> <p>“Subject to the authority of the board, a general faculties council is responsible for the academic affairs of the university and, without restricting the generality of the foregoing has the authority to [...]</p> <p>(o) make recommendations to the board with respect to affiliation with other institutions, academic planning, campus planning, a building program, the budget [...] and any other matters considered by the general faculties council to be of interest to the university[.] [...].”</p> <p>2. <b>Post-Secondary Learning Act (PSLA)</b> Section 78 states:</p> <p><b>“Business plans</b></p> <p><b>78(1)</b> Each year a board must prepare and approve a business plan that includes</p> <p>(a) the budget, and</p> <p>(b) any other information required by the Minister.</p> <p><b>(2)</b> The business plan approved under subsection (1) must be submitted to the Minister on or before the date specified by the Minister.</p> <p>[...]</p> <p><b>Access plan</b></p> <p><b>78.1</b> Each year a board must prepare an access plan in accordance with the regulations and submit it to the Minister on or before the date specified by the Minister.”</p> <p>3. <b>Post-Secondary Learning Act (PSLA)</b> Section 80 states: “The board must submit to the Minister any reports or other information required by the Minister.”</p> <p>4. <b>Board Finance and Property Committee (BFPC) Terms of</b></p>

Item No. 6

	<p><b>Reference, Section 3.c.</b> states that the Committee shall “[...] review and recommend to the Board the annual and other budgets and major issues of policy related to budgets[.] [...]”</p> <p>5. <b>Board Learning and Discovery Committee (BLDC) Terms of Reference/Mandate of the Committee (Section 3):</b> “Except as provided in paragraph 4 hereof and in the Board’s General Committee Terms of Reference, the Committee shall, in accordance with the Committee’s responsibilities with powers granted under the Post-Secondary Learning Act, monitor, evaluate, advise and make decisions on behalf of the Board with respect to matters concerning the teaching and research affairs of the University, including proposals coming from the administration and from General Faculties Council (the “GFC”), and shall consider future educational expectations and challenges to be faced by the University. The Committee shall also include any other matter delegated to the Committee by the Board.</p> <p>Without limiting the generality of the foregoing the Committee shall: [...]</p> <p>f. undertake studies and review academic matters that pertain to the quality of the educational experience at the University;</p> <p>g. monitor educational and research trends, community expectations and demands; [...]</p> <p>i. ensure that the academic teaching and research activities at the University are administered and undertaken in a manner consistent with the vision and mission of the University;</p> <p>j. consider future educational expectations and challenges to be faced by the University[.] [...]”</p> <p>6. <b>GFC Academic Planning Committee Terms of Reference/3. Mandate of the Committee:</b> “The Academic Planning Committee (APC) is GFC’s senior committee dealing with academic, financial and planning issues. [...]”</p> <p>APC is responsible for making recommendations to GFC and/or to the Board of Governors concerning policy matters and action matters with respect to the following:</p> <p><b>1. Planning and Priorities:</b> To recommend to GFC and/or the Board of Governors on planning and priorities with respect to the University’s longer term academic, financial, and facilities development.</p> <p>[...]</p> <p><b>4. Budget Matters [...]</b></p> <p>b. To recommend to the Board of Governors on the annual budget, excluding budgets for ancillary units.”</p>
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**Routing (Include meeting dates)**

Consultative Route	President’s Executive Committee (review of draft), January 28, 2016;
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**Item No. 6**

(parties who have seen the proposal and in what capacity)	Joint BFPC/Board of Governors/GFC- APC- CIP Briefing – February 5, 2016
Approval Route (Governance) (including meeting dates)	GFC Academic Planning Committee (for recommendation), February 10 <sup>h</sup> , 2016; Board Learning and Discovery Committee (for recommendation-academic chapter only) February 29, 2016 Board Finance and Property Committee (for recommendation) March 1, 2016; Board of Governors (for final approval) – March 18, 2016
Final Approver	Board of Governors

Attachments (each to be numbered 1 - <>)

1. Attachment 1: University of Alberta Comprehensive Institutional Plan 2016 (pages 1- 93)

*Prepared by:* Andrea Smith, SAO, Office of the Vice-President (University Relations) [andrea.smith@ualberta.ca](mailto:andrea.smith@ualberta.ca)

Revised: 2/9/2016

# UNIVERSITY OF ALBERTA COMPREHENSIVE INSTITUTIONAL PLAN 2016

**DRAFT: January 29, 2016**



# TABLE OF CONTENTS

EXECUTIVE SUMMARY

ACCOUNTABILITY STATEMENT

INSTITUTIONAL CONTEXT

University of Alberta Mandate

Mission Statement

AFFORDABILITY, ACCESSIBILITY, AND QUALITY GOALS, PRIORITY  
INITIATIVES, AND EXPECTED OUTCOMES

Appendix A: Financial and Budget Information

Appendix B: Enrolment Plan and Proposed Programming Changes

Appendix C: Research, Applied Research, and Scholarly Activities

Appendix D: Community Outreach and Under-represented Learners

Appendix E: Internationalization

Appendix F: Capital Plan

Appendix G: Information Technology

# LIST OF FIGURES AND TABLES

Figure 1	Consolidated Revenue Budget 2016–2017 by source
Figure 2	Consolidated Expense Budget 2016–2017 by type
Figure 3	Enrolment Targets Measures in FLEs (Does not include PGME/DE)
Figure 4	Impact of Energy Management Plan Measures on CO <sub>2</sub> Emissions, 1990-2030
Table 1	2016–2017 Consolidated Budget (\$,000)
Table 2	2016–2017 Consolidated Budget by Fund (\$,000)
Table 3	2016–2017 Capital Budget (\$,000)
Table 4	2016–2017 Ancillaries Budget (\$,000)
Table 5	Statement of Operations Budget for the Years Ending March 31, 2016 to 2020 (\$,000)
Table 6	Statement of Cash Flows Budget for the Years Ending March 31, 2016 to 2020 (\$,000)
Table 7	University of Alberta: Enrolment Targets Measured in FLEs (Does not include PGME/DE)
Table 8	Highest New Capital Priorities (listed in order of institutional priority)
Table 9	Highest Expansion Priorities (listed in order of institutional priority)
Table 10	Highest Preservation Priorities (listed in order of institutional priority)
Table 11	Highest Renewal Priorities (listed in order of institutional priority)

# Executive Summary

The vision of the University of Alberta is to inspire the human spirit through outstanding achievements in learning, discovery, and citizenship in a creative community, building one of the world's great universities for the public good. It is recognized as one of the top 100 public universities in the world and as one of Canada's top five comprehensive academic and research institutions. Through research and teaching excellence, the U of A is driving Alberta's future prosperity through the education and training of the next generation of scientists, business owners, social scientists, policy-makers, musicians, artists, and volunteers who will contribute to a thriving civic culture and a vibrant socio-economic landscape.

As one of Canada's pre-eminent research-intensive institutions, the University of Alberta is leading the province in world-class research outcomes and student experiences that drive innovation and enhance social, cultural, and economic development. In addition to the centrality of the post-secondary sector to job growth and economic diversification, it is also a critical source for skills development in civic engagement and community service and outreach. Through programs like Community Service-Learning (CSL), the U of A is providing students with opportunities to work and have a direct impact on local organizations and the not-for-profit sector while simultaneously fostering partnerships between the university and its surrounding communities. Through linking academic work with community-based experience, the U of A is equipping students with the communication, critical thinking, and leadership skills they will need to be successful in their chosen fields, while increasing public awareness of social issues and enhancing university-community relationships.

Within a highly competitive global knowledge economy, the value of university excellence in education, research, and service cannot be overstated. With 200 undergraduate programs and 170 graduate programs spanning 18 faculties, as well as a variety of other programs designed to meet the needs of Alberta's adult learners, the multi-campus U of A supports learners and learning, and creativity and discovery, while facilitating access to opportunities for traditional and non-traditional students and researchers. Research-intensive institutions like the U of A are ideally placed to address societal problems from a multidisciplinary perspective.

The university remains steadfastly committed to partnering with the Government of Alberta to explore opportunities for growth, to continuing to diversify Alberta's economy, and to serving the province of Alberta by taking a leadership role.

The goals ubiquitously address access, affordability, and quality. The U of A is always concerned with quality. Specific attention to quality of programs is mentioned only where we feel there is work to be done to achieve our pervasive high standards. We don't dwell on quality because it is a foundational expectation. The university is concerned with access and this is explicit in many of the goals presented. Affordability is important for all of our programs, and must be balanced with the needs to address quality and access, and also with the need to be globally competitive in addition to being the leading post-secondary institution in Alberta.

The 2016 Comprehensive Institutional Plan (CIP) document is transitional in nature as the University of Alberta is in the midst of an institutional strategic planning process. The main objective during this process is to develop a plan that all members of the U of A community create and embrace. It will reflect common values and capture a collective vision of what the university aspires to be. Together, the university community will establish concrete, achievable,

and measurable goals and strategies that will support the university's vision and provide direction that both responds to and takes advantage of changing external and internal environments. In the years ahead, the university will look to this strategic plan to guide all institutional academic and administrative priority-setting, decision-making and governance.

For the 2016 CIP, the University of Alberta is focused on six key priorities:

- Faculty renewal
- Student experience
- Teaching and learning
- Research excellence
- Community engagement
- Infrastructure

### **Faculty Renewal**

There is an urgent need to address the low number of assistant professors. These new professors play a critical role in the academy by bringing with them vibrant perspectives and contributing to the university's teaching and innovative research capacity. This deficit has been created by reduced hiring after a series of challenges to the university's base operating budget. Creative solutions are being developed to increase the number of new assistant professors. Renewal strategies must also address diversity in the academy with particular attention to growing the number of Indigenous scholars and ensuring that Indigenous scholarship becomes more prominent, as well as ensuring a strong presence of globally relevant perspectives. Identifying, recruiting, and supporting the next generation of faculty is critical. Success will be influenced by social, intellectual, and physical supports such as social forums and gathering places, critical masses of scholars to support the development of strong ideas, and new and modernized infrastructure including spaces, labs, and classrooms.

### **Student Experience**

To attract, retain, and support its diverse body of students—local, rural, national, international, and under-represented—the U of A must provide contemporary and innovative learning experiences, including community service learning and experiential learning. The university must foster a welcoming and supportive environment in physical and social terms. Students require facilities that allow them to feel comfortable and that promote engagement with people, ideas, and learning supports. To succeed, students must understand they are essential members of the university community and must see the university as a necessary and relevant stepping stone towards engagement with the rest of the world. As such, the university is focused on recruiting a more diverse student body and creating programs and spaces such as the Maskwa House of Learning on North Campus, as well as refreshed science labs at Augustana Campus and Campus Saint-Jean, that support and welcome Indigenous and rural students to pursue advanced degrees. Experiential learning (e.g. through summer research programs) positions students strongly for future career opportunities.

### **Teaching and Learning**

This is the core activity of the university—supporting undergraduate and graduate students, researchers, and scholars, as well as accomplished members of professions who need to refresh their educations to advance their positions in industry or to advance industry itself. Teaching and learning practices have shifted away from traditional lecture-style presentations to a greater breadth of learner styles and more opportunities to co-create and engage with knowledge, by focusing on emerging technologies to reach beyond classrooms and to enhance classroom activities. More hands-on experiences are also provided to bridge the theory-to-

practice gap. The university endeavours to more strongly embrace these shifts and to better support professors who want to change the way they teach—to purchase, update and even create better physical and technological systems and places to permit innovative teaching, learning, and assessment. The university also strives to attend to its greater mission to transform society and culture by ensuring all content respects Indigeneity, equity, and diversity.

### **Research Excellence**

Research drives innovative developments leading to economic growth and prosperity in our society. As the leading research-intensive institution in Alberta, and one of the top five in Canada, the U of A has a particular responsibility to ensure that its people and the materials and resources they need—such as labs, IT infrastructure and supports, libraries, and access to communities—are of the highest quality possible. The research world has indisputably shifted to team-based explorations and approaches to discovery that are more multidisciplinary in nature and globally relevant. The university competes nationally and internationally for the best researchers, as well as for the top funding sources to support research activities. To recruit exceptional researchers and to support them in producing the highest-calibre outcomes, including the training of professionals and scholars, attention and resources must be devoted to research facilities and defining (and then pursuing) research excellence in a shifting context. This requires intellectual and physical supports including new hires, research assistants, infrastructure, and specifically targeted development and investment in partnerships with communities, industries, and other countries.

### **Community Engagement**

The university is focused on enhancing the communities in which it operates, as well as the communities with which it engages, both near and far. The university will strive to maintain and expand connections with communities, increasing engagement and consultation. This includes direct interaction such as meetings or events with community members and stakeholder groups, as well as the development of welcoming spaces and partnerships around facilities to enhance university integration with community groups. For example, the Twin Arenas project at South Campus will expand current opportunities for groups to engage with each other and to work toward mutual goals such as supporting the development of minor sport and coaching. The Edmonton Galleria Project downtown will invigorate and increase accessibility to fine arts programs in music, and in art and design. The development of facilities, programming and, most important, relationships will be priorities in this area. Interaction with industry provides expanded experiences for our students as they prepare to enter the workforce.

### **Infrastructure**

As Alberta's largest and oldest post-secondary institution, the U of A manages more than 1.7 million square metres of complex facility inventory, ranging in age from more than 100 years old to brand new. Existing facilities must be able to keep pace with the ongoing teaching, research, and administrative needs of a changing campus community and expanding research mandate. There is also a need to ensure that the university has the necessary infrastructure to support and foster continued enrolment growth and key faculty recruitment. Continued research growth requires increasingly complex labs and equipment, and increased participation of under-represented populations. Among the university's capital priorities are maintaining and refurbishing older facilities, such as the historic Dentistry/Pharmacy building; constructing new academic buildings such as the Translational Lab on North Campus and the new Science Lab at Augustana; creating new and contemporary residence spaces to support more students with diverse needs; creating buildings and spaces to address reconciliation responsibilities, such as the Maskwa House of Learning; and building facilities that enhance community engagement, such as the Edmonton Galleria Project and the Twin Arenas on South Campus.

# Accountability Statement

This Comprehensive Institutional Plan was prepared under the Board's direction in accordance with legislation and associated ministerial guidelines, and in consideration of all policy decisions and material, economic, or fiscal implications of which the Board is aware.

**Richard W. Wilson, QC**  
Acting Chair, University of Alberta Board of Governors

# Mission Statement

The mission of the University of Alberta is to serve our community by the dissemination of knowledge through teaching and the discovery of knowledge through research. The mission will be carried out in a select number of fields and professions, to be determined within the context of a province-wide educational system and based upon the highest national and international standards.

# Institutional Context

## University of Alberta Mandate

***As approved by the Minister of Advanced Education and Technology, July 2009***

Created by the *University Act*, 1906, of the Legislative Assembly of the Province of Alberta, the University of Alberta is a board-governed, publicly-funded university that operates as a Comprehensive Academic and Research Institution under the authority of Alberta's Post-Secondary Learning Act. Its fundamental mandate is to offer a broad range of outstanding learning and research programs to prepare citizens and leaders who will make a difference. The university plays a leading role in Campus Alberta through collaboration with other Alberta institutions, responding to vital community relationships at every level, and giving a national and international voice to Alberta innovation. Its activities enhance student opportunities and build Alberta's capacity for long-term, knowledge-driven sustainable development at the global forefront.

The university provides instructional excellence through both on-campus and distance delivery in a vibrant and supportive learning and research environment. Its residential, multi-campus setting includes many research and field facilities. The university community discovers, disseminates, and applies new knowledge through interrelated core activities. In a dynamic and integrated learning and research environment, the University of Alberta offers graduate and undergraduate students the opportunity to earn internationally respected credentials, including bachelor's, master's and doctoral degrees, and university certificates and diplomas. It also offers programs in French leading to university degrees, certificates, and diplomas, as well as college certificates and diplomas. A number of its programs are unique within Alberta and western Canada. Post-doctoral fellows come to the university to refine their teaching, mentoring, and research skills.

The University of Alberta is a balanced academy, with strong arts and sciences programs featuring the faculties of Agricultural, Life and Environmental Sciences, Arts, Augustana, Extension, Native Studies, Physical Education and Recreation, Science, and Campus Saint-Jean. These faculties are foundational to and interlinked with the university's network of strong professional faculties, including Business, Education, Engineering, Graduate Studies and Research, Law, Medicine and Dentistry, Nursing, Pharmacy and Pharmaceutical Sciences, Public Health, and Rehabilitation Medicine. In addition, all of our faculties are involved in professional development and continuing education.

The university establishes and maintains an environment of inquiry-based learning anchored in strong academic programming and an array of co-curricular student life opportunities. Academic support, social/community enrichment, health and wellness, and career and life development are cornerstones of the University of Alberta student experience. The intellectual and creative diversity of the campus, including its international and multicultural population and exchange programs, makes for an engaging student experience. Fine arts displays, stage performances, museum collections, athletics, and recreational opportunities combine with residence life to present multi-dimensional possibilities. Experiential learning opportunities based in the community augment on-campus activities with real-life applications.

Transfer and collaborative degree completion agreements with partner institutions broaden student opportunities and provide rural, northern, and Indigenous communities with access to

University of Alberta programs. Similar innovative arrangements centred at the university deliver information and knowledge resources to post-secondary and government communities through both inter-library and online access.

The university's research and creative activities produce a dual impact through the preparation of highly qualified graduates and a continuous flow of innovation. The university attracts scholars of international reputation: undergraduate and graduate students, post-doctoral fellows, staff, and faculty. Collectively, they foster, conduct, and disseminate research and creative activity, pure and applied, within and across all the major program areas at an internationally recognized level of excellence.

University faculties, centres, and institutes combine resources and talents for collaborative advantage through research partnerships with other academic institutions, business, governments and public agencies. The university actively transfers new knowledge and creative works to Alberta, Canada, and the world for community benefit, including commercial development of intellectual property when appropriate and feasible.

In every aspect of its mandate, the University of Alberta partners with the province of Alberta in social, cultural, and economic development, fostering and establishing the provincial, national, and international connections and understanding that support leading global enterprise and citizenship for Albertans. University administrators, faculty, staff, and students contribute regularly to public debate and to government and corporate examination of issues. Start-up companies and new technologies licensed to existing companies lead Alberta in new directions and employ graduates. The university continually moves out into its communities through its graduates, its creative and research advances, and its ongoing opportunities for experiential and lifelong learning.

## Affordability, Accessibility, and Quality Goals, Priority Initiatives, and Expected Outcomes

As a large research-intensive university, the University of Alberta is like a small city, with a population larger than that of Charlottetown, PEI, or Brandon, Manitoba. In total, there are close to 50,000 people pursuing their educational credentials and careers as academic and non-academic staff at the U of A. They undertake these pursuits in more than 100 buildings across five campuses (North or Main Campus, South Campus, Campus Saint-Jean, Augustana Campus, and Enterprise Square).

Like a city, the U of A has many short- and long-term goals. Student cohorts stay with us for anywhere from two years (certificates and master's programs) through four or six years (undergraduate and PhD programs). Many students will complete up to three degree programs with us. At any one time, there is a minimum of four cohorts of undergraduate students (based on a standard four-year undergraduate degree). Graduate students' progress is celebrated by milestone achievements and exams, so reporting their 'years' of study is less meaningful, but



their total time to completion is still an important metric. At the U of A, faculty must move through the stringent evaluation steps defining the period of assistant professor in a maximum of seven years. If they successfully achieve tenure and promotion, they can be with us a further 20 to 30 years.

The U of A experiences many of the social, economic, environmental, and physical challenges of small cities. The U of A needs to attract and retain top students (in cohorts), and exceptional faculty and staff (who must be willing to grow and change with the cohorts over long careers). The university is an engaging environment in that its largest segment of (students) constantly refreshes (the undergraduates always have an average age of about 20 years) and the stable component of the institution, the faculty and staff as a group, must be managed and developed to maintain a healthy demographic profile and to respond to external changing political, social, economic, and environmental conditions—all at the same time as anticipating and planning the educational path for the future cohorts who will go on to become scientific and civic leaders.

The university must persist and grow with, and in spite of, external challenges. It must look into the future, through research and discovery, to create the next generations of citizens. As a result, the goals of the university encompass basic maintenance and repair of aging infrastructure; creating and building new infrastructure; shifting away from an “ivory tower” approach to higher education to vibrant community engagement and collaboration with scholarship and scientific discovery; continuing to pursue research excellence across all segments of the academy; translating research knowledge to community and to learners; embracing, and in fact developing, new ways of teaching and learning to provide transformative experiences for students; and renewing the professoriate that is the backbone of all these activities.

The following goals, initiatives, outcomes, and measures describe the path of the U of A over the next one to three years. The goals all reflect the constant pursuit of quality, ensure appropriate affordability, and maximize access—broadly defined. These goals will ensure the university retains and improves its position as a top 100 university in the world, and best serves its strongest ally and constituent community, the province of Alberta.

<b>Goals – Faculty Renewal</b>		
<b>Type</b>	<b>Description</b>	<b>Expected Completion Date</b>
G1 Faculty Renewal	To renew the professoriate, improving the balance of ranks and increasing diversity.	2020
<b>Priority Initiatives – Faculty Renewal</b>		
P1 Increase the number of assistant professors	Assistant professors represent the academic future of the university. The pool needs renewal, as it has been depleted over recent years.	2020
P2 Increase faculty identifying as Indigenous	Prioritize the hiring of scholars who are members of Indigenous groups.	2020
P3 Increase the diversity of the academy	Individuals with diverse backgrounds expand our available conceptual tools, leading to a more creative academy. Prioritize hiring women and visible minorities, institute a high-level review of current status and hiring processes, and develop strategies for increasing awareness and diversity.	Ongoing, achieved by 2025
P4 Attend to deferred maintenance required to support Faculty Renewal	Alberta's substantial investment in the infrastructure of the university requires regular maintenance. Welcoming, modernized spaces support teaching, research, and learning for faculty, staff, and students. The highest priority expansion and preservation projects required to support Faculty Renewal are noted in Appendix F (Tables 8 and 9). Critical projects in the immediate future relating to Faculty Renewal include the Maskwa House of Learning as we endeavour to recruit more Indigenous faculty and students, the Translational Lab on North Campus, the Edmonton Galleria project that will allow the departments of music and art and design to expand to meet enrolment and programming demands, and a refurbishment and modernization of the science labs at Augustana Campus and Campus Saint-Jean.	<ul style="list-style-type: none"> <li>• Maskwa House of Learning: 2018 (Table 1 - New Capital Priorities)</li> <li>• Translational Lab: 2020 (Table 1 - New Capital Priorities)</li> <li>• Galleria Project: 2019 (Table 1 – New Capital Priorities)</li> <li>• Augustana Science Labs: 2020 (Table 2 - Expansion Priorities)</li> </ul>
<b>Expected Outcomes – Faculty Renewal</b>		
EO1 Implement employment equity and diversity strategies	Review and strengthen existing strategies to create an equitable and respectful workplace.	2020

EO2 Expand programs to support best practices in inclusive recruitment and hiring	Provide formal training and support for committees in the recruitment and sensitive consideration of highly qualified candidates from diverse constituencies.	2020																																			
EO3 Tailor and enhance existing mentoring programs to support the cohort of new faculty	Leverage network or co-mentoring approaches connected to teaching, learning, research, engagement, and service to support diverse new faculty.	2018																																			
<b>Performance Measures – Faculty Renewal</b>																																					
PM 1 Increase assistant professors to 21 per cent of the total number of faculty.	<table border="1"> <thead> <tr> <th data-bbox="615 462 921 557"></th> <th data-bbox="926 462 1066 557">Last Actual 2015-16</th> <th data-bbox="1071 462 1192 557">Target 2016-17</th> <th data-bbox="1197 462 1339 557">Target 2017-18</th> <th data-bbox="1344 462 1465 557">Target 2025</th> </tr> </thead> <tbody> <tr> <td data-bbox="615 560 921 638">Proportion of assistant professors</td> <td data-bbox="926 560 1066 638">17%</td> <td data-bbox="1071 560 1192 638">17%</td> <td data-bbox="1197 560 1339 638">18%</td> <td data-bbox="1344 560 1465 638">21%</td> </tr> <tr> <td colspan="5" data-bbox="615 641 1465 686">Source:</td> </tr> <tr> <td colspan="5" data-bbox="615 690 1465 735">Acorn Data Warehouse, as of Jan. 7, 2015.</td> </tr> <tr> <td colspan="5" data-bbox="615 738 1465 784">Notes:</td> </tr> <tr> <td colspan="5" data-bbox="615 787 1465 833">Data are as of Oct. 1, 2015.</td> </tr> <tr> <td colspan="5" data-bbox="615 836 1465 881">Proportion is based on total faculty count.</td> </tr> </tbody> </table>		Last Actual 2015-16	Target 2016-17	Target 2017-18	Target 2025	Proportion of assistant professors	17%	17%	18%	21%	Source:					Acorn Data Warehouse, as of Jan. 7, 2015.					Notes:					Data are as of Oct. 1, 2015.					Proportion is based on total faculty count.					2025 <sup>1</sup>
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PM 2 Increase Indigenous faculty members by 50 per cent from 17 to 26.	<table border="1"> <thead> <tr> <th data-bbox="615 896 1026 990"></th> <th data-bbox="1031 896 1163 990">Last Actual 2014-15</th> <th data-bbox="1167 896 1299 990">Target 2016-17</th> <th data-bbox="1304 896 1436 990">Target 2025</th> </tr> </thead> <tbody> <tr> <td data-bbox="615 993 1026 1071">Number of Indigenous faculty members</td> <td data-bbox="1031 993 1163 1071">17</td> <td data-bbox="1167 993 1299 1071">17</td> <td data-bbox="1304 993 1436 1071">26</td> </tr> <tr> <td colspan="4" data-bbox="615 1075 1436 1120">Source:</td> </tr> <tr> <td colspan="4" data-bbox="615 1123 1436 1169">Equity Office</td> </tr> <tr> <td colspan="4" data-bbox="615 1172 1436 1218">Notes:</td> </tr> <tr> <td colspan="4" data-bbox="615 1221 1436 1266">Data are as of Dec. 31 of the reported year.</td> </tr> <tr> <td colspan="4" data-bbox="615 1269 1436 1315">Excludes contingent faculty.</td> </tr> </tbody> </table>		Last Actual 2014-15	Target 2016-17	Target 2025	Number of Indigenous faculty members	17	17	26	Source:				Equity Office				Notes:				Data are as of Dec. 31 of the reported year.				Excludes contingent faculty.				2025							
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<sup>1</sup> This date is dependent on both funding and attrition due to retirements or resignations, factors which cannot be reliably predicted.

<p>PM3 Increase female faculty members to 43 per cent of total number.</p>	<table border="1"> <thead> <tr> <th></th> <th>Last Actual 2015-16</th> <th>Target 2016-17</th> <th>Target 2025</th> </tr> </thead> <tbody> <tr> <td>Proportion of female professors</td> <td>36%</td> <td>36%</td> <td>43%</td> </tr> <tr> <td colspan="4">Source:</td> </tr> <tr> <td colspan="4">Acorn Data Warehouse, as of Jan. 7, 2015.</td> </tr> <tr> <td colspan="4">Notes:</td> </tr> <tr> <td colspan="4">Data are as of Oct. 1, 2015.</td> </tr> <tr> <td colspan="4">Proportion is based on total faculty count.</td> </tr> </tbody> </table>		Last Actual 2015-16	Target 2016-17	Target 2025	Proportion of female professors	36%	36%	43%	Source:				Acorn Data Warehouse, as of Jan. 7, 2015.				Notes:				Data are as of Oct. 1, 2015.				Proportion is based on total faculty count.				<p>2025</p>							
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<p>PM4 Increase the number of faculty members from under-represented groups.</p>	<table border="1"> <thead> <tr> <th></th> <th>Last Actual 2014-15</th> <th>Target 2016-17</th> <th>Target 2017-18</th> <th>Target 2025</th> </tr> </thead> <tbody> <tr> <td>Proportion of faculty members from visible minority groups</td> <td>17%</td> <td>17%</td> <td>18%</td> <td>20%</td> </tr> <tr> <td colspan="5">Source:</td> </tr> <tr> <td colspan="5">Equity Office</td> </tr> <tr> <td colspan="5">Notes:</td> </tr> <tr> <td colspan="5">Data are as of Dec. 31 of the reported year.</td> </tr> <tr> <td colspan="5">Excludes contingent faculty.</td> </tr> </tbody> </table>		Last Actual 2014-15	Target 2016-17	Target 2017-18	Target 2025	Proportion of faculty members from visible minority groups	17%	17%	18%	20%	Source:					Equity Office					Notes:					Data are as of Dec. 31 of the reported year.					Excludes contingent faculty.					<p>2025</p>
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<b>Goals – Student Experience</b>		
<b>Type</b>	<b>Description</b>	<b>Expected Completion Date<sup>2</sup></b>
G2 Increase the breadth of locations from which U of A undergraduate students are drawn	Nearly half of the undergraduate students at the U of A currently list their hometown as Edmonton. Increase geographical reach to bring a diverse group of Albertans, Canadians, and international students to the U of A to serve provincial labour market development.	2025
G3 Increase recruitment and retention of Indigenous students	Increase the number of Indigenous students to reflect their demographic representation in the Alberta population (from two per cent to six per cent). Improve retention of Indigenous students to match retention for other groups in the same cohort.	2025
G4 Improve access to student services, especially those that support a healthy campus	Health, particularly mental health, is not the absence of illness. Programs to ensure well-being will benefit students, staff, and faculty, will make the university a more safe, productive, and accessible learning and work environment, and will ensure students reach their potential.	2018
<b>Priority Initiatives – Student Experience</b>		
P1 Increase recruitment of Alberta students from outside the Greater Edmonton area	To increase reach and impact across the province.	2025
P2 Build sufficient residence capacity to house all first-year students requesting on-campus housing	Students' academic experience is enriched by linking learning with other aspects of their lives. Living in on-campus residences significantly affects and supports student success and provides opportunities and access to rural, Indigenous, under-represented, and international students. Phase 1 of the expanded housing strategy will include design and construction of 820 new bed spaces as described in Appendix F.	2018
P3 Increase recruitment of international students and seek a more even distribution of countries of origin	To increase the opportunities for local students to experience international connections, to enhance the global community, and to reduce reliance on a small number of sources for international students.	2025
P4 Increase support for Indigenous students	Early identification of needs, tailoring, and enhancing service availability upon acceptance, upon arrival on campus, and early in the program; indigenizing campuses.	2020

<sup>2</sup> These dates consider that students are arranged in four- to six-year cohorts, minimally requiring that time frame for any turnover of demographics.

P5 Complete Maskwa House of Learning	Provide a space where Indigenous and non-Indigenous people can meet on campus to learn about each other. This new space will also support ceremonies, events, and services for Indigenous peoples. Renewed programming within Education North will be offered in conjunction with initiative. Details of the project can be found in Table 8 of Appendix F. <sup>3</sup>	2018
P6 Sustain and enhance student mental health initiatives, including increased access to mental health services	Mental health services and initiatives benefit the health of all members of the university community.	2017
P7 Commence renewal of the Office of the Dean of Students	Commence a significant restructuring of the offices that deliver front-line student services. Increased capacity and more efficient access to student services will improve the overall student experience, thereby improving student satisfaction, retention, and completion rates.	2017
P8 Implement the recommendations of the Healthy Campus Strategic Plan	Ensure the alignment and optimal deployment of campus wellness services to ensure maximum benefit for faculty, staff, and students.	2018
P9 Implement the recommendations of the Review of the University of Alberta's Response to Sexual Assault	Take action to provide a safe and secure working and learning environment, acknowledging the inherent dignity of each member of our community.	2017
P10 Implement an institutional Sustainability Plan	The Sustainability Plan supports the three pillars of sustainability: environmental, economic, and social. Plans are in place to "green" U of A activities, to reduce energy demands, and to increase quality of experience on campus for all. This will include evaluating the benefits of adding energy co-generation capacity in the university heating plant to decrease greenhouse gas emissions, as described in Appendix F.	2020
<b>Expected Outcomes – Student Experience</b>		
EO1 Implementation of a revised national and international recruitment strategy	Deploy recruitment resources to expand recruitment of students from across Alberta, Canada, and from a broad range of other countries.	2017

<sup>3</sup> The Maskwa House of Learning will jointly support the goals of faculty renewal, student experience, and teaching and learning.

EO2 Increased offers of admission to selected groups	Expand offers to qualified potential students in key regions of the province and the world.	2017																					
EO3 Increased acceptance of offers of admission to selected groups	Increase uptake of offers made to potential students in key regions of the province and the world—an indicator of reputation among students who have multiple choices.	2019																					
E04 Improved student experience through expanded supports for student life	Increase efficiency of student access to on-campus student services and supports.	2017																					
<b>Performance Measures – Student Experience</b>																							
PM1 Number of students from regions of Alberta outside Edmonton (Alberta students)	<p>Maintain the current proportion of Alberta students from outside the Greater Edmonton area.</p> <table border="1" data-bbox="619 626 1425 1192"> <thead> <tr> <th data-bbox="619 626 1106 753"></th> <th data-bbox="1106 626 1276 753">Last Actual 2015-16</th> <th data-bbox="1276 626 1425 753">Target 2016-17</th> </tr> </thead> <tbody> <tr> <td data-bbox="619 753 1106 919">Proportion of Alberta undergraduate students from outside of Edmonton</td> <td data-bbox="1106 753 1276 919">32%</td> <td data-bbox="1276 753 1425 919">32%</td> </tr> <tr> <td colspan="3" data-bbox="619 919 1425 967">Source:</td> </tr> <tr> <td colspan="3" data-bbox="619 967 1425 1016">Acorn Data Warehouse as of Jan. 7, 2015.</td> </tr> <tr> <td colspan="3" data-bbox="619 1016 1425 1065">Notes:</td> </tr> <tr> <td colspan="3" data-bbox="619 1065 1425 1146">Proportion based on students registered on Dec. 1, 2015, with an original hometown census province of Alberta and a hometown census that is not Edmonton.</td> </tr> <tr> <td colspan="3" data-bbox="619 1146 1425 1192">Excludes medical/dental residents.</td> </tr> </tbody> </table>		Last Actual 2015-16	Target 2016-17	Proportion of Alberta undergraduate students from outside of Edmonton	32%	32%	Source:			Acorn Data Warehouse as of Jan. 7, 2015.			Notes:			Proportion based on students registered on Dec. 1, 2015, with an original hometown census province of Alberta and a hometown census that is not Edmonton.			Excludes medical/dental residents.			2018
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PM2 Distribution of international students

Maintain the current proportion of international students with attention to the distribution by country. Targets to be determined through institutional strategic planning process.

2018

<b>Source County of International Students , 2015-2016</b>		
<b>Graduate</b>	China	920
	Iran	414
	India	248
	USA	134
	Bangladesh	100
	Saudi Arabia	69
	Brazil	64
	Pakistan	56
	Nigeria	55
	Egypt	54
<b>Undergraduate</b>	China	3,120
	South Korea	123
	Nigeria	99
	India	98
	Hong Kong	65
	Japan	56
	Brazil	51
Source: Acorn Data Warehouse, as of Jan. 18, 2016.		
Notes:		
Excludes career preparation students.		
Excludes a small number of records with national status of unknown.		
Includes countries with 50 or more students indicating this as their country of citizenship.		
Includes students with an original national status of international. Data are as of Dec. 1, 2015. Data are preliminary.		
Excludes medical and dental residents.		



PM3 Indigenous persons make up six per cent of the undergraduate cohort	Define and achieve target for Indigenous students, taking into account both the composition of the university-aged population of Alberta and the percentage of high-school completers within this, and the broader, cohort.	2025																																			
PM4 Use of campus wellness services	<p>Visits to campus wellness services indicate that our campus population is able to access necessary services on campus.</p> <table border="1" data-bbox="621 354 1671 659"> <thead> <tr> <th colspan="5">Uptake of Health Services</th> </tr> <tr> <th>Unit</th> <th>Measure</th> <th>2012-13</th> <th>2013-14</th> <th>2014-15</th> </tr> </thead> <tbody> <tr> <td>UHC<sup>4</sup></td> <td>Total visits</td> <td>49,540</td> <td>48,953</td> <td>47,595</td> </tr> <tr> <td>CCS<sup>5</sup></td> <td>Direct treatment</td> <td>10,025</td> <td>12,189</td> <td>12,474</td> </tr> <tr> <td>Pharm<sup>6</sup></td> <td>Prescriptions filled</td> <td>35,456</td> <td>35,420</td> <td>34,906</td> </tr> <tr> <td>SAC<sup>7</sup></td> <td>Support sessions</td> <td>206</td> <td>217</td> <td>255</td> </tr> <tr> <td>SAC</td> <td>Psychological services</td> <td>n/a</td> <td>287</td> <td>430</td> </tr> </tbody> </table> <p>Source: Dean of Students</p> <p>Notes: Based on the fiscal year, April to March. Total visits: Counts visits, not individuals. Includes students, staff, faculty, and immediate family of students. Direct treatment services are only for students. Direct treatment includes individual psychology and psychiatric appointments, group therapy sessions, and initial consultations. Prescriptions filled is the industry standard metric for general pharmacy service level. Support sessions includes both drop-in and appointments, but does not include in-house psychologist (captured separately). Psychological services capture the number of support sessions delivered by the in-house psychologist.</p>	Uptake of Health Services					Unit	Measure	2012-13	2013-14	2014-15	UHC <sup>4</sup>	Total visits	49,540	48,953	47,595	CCS <sup>5</sup>	Direct treatment	10,025	12,189	12,474	Pharm <sup>6</sup>	Prescriptions filled	35,456	35,420	34,906	SAC <sup>7</sup>	Support sessions	206	217	255	SAC	Psychological services	n/a	287	430	Ongoing
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<sup>4</sup> University Health Centre

<sup>5</sup> University of Alberta Counselling and Clinical Services

<sup>6</sup> University of Alberta Pharmacy

<sup>7</sup> University of Alberta Sexual Assault Centre

PM5 Graduate satisfaction	Graduate satisfaction as reported in the Alberta Graduate Outcomes Survey.			Ongoing	
	<b>Graduate Satisfaction with their educational Experience</b>	<b>Last Actual 2014</b>	<b>Target 2016</b>		<b>Target 2018</b>
	Proportion of graduates who are satisfied	90%	90%		90%
	Source: Alberta Enterprise and Advanced Education: Alberta Graduate Outcomes Survey. Note: Data are the most recent available.				
<b>Goals – Teaching and Learning</b>					
<b>Type</b>	<b>Description</b>			<b>Expected Completion Date</b>	
G5 Enhance teaching and the focus on learning outcomes	Post-secondary teaching is undergoing a radical change that will benefit learners. Supports will be put in place to ensure that the U of A remains a leader in this field.			2020	
<b>Priority Initiatives – Teaching and Learning</b>					
P1 Support training in new teaching methods and curriculum design	Increase instructor access to training and mentorship, particularly in use of emerging technologies in teaching such as flipped classrooms, blended learning, and other digital access. <sup>8</sup>			2020	
P2 Improve access for distance and non-traditional learners	Offer classes through distance learning and explore flexible and creative scheduling to accommodate diverse learners.			2020	
P3 Improve mentorship and skills development for graduate students	Eighty per cent of graduate students work outside of the academy and need help to transition as highly qualified personnel serving government, industry, and cultural sectors of society.			2018	
P4 Indigenization of the curriculum	Increase the exposure of all faculty, staff, and students to Indigenous history and traditional ways of knowing.			2018	
<b>Expected Outcomes – Teaching and Learning</b>					
EO1 Increased emphasis on new teaching methods	Increase the uptake of new models for instructional design, assessment, and teaching by the professoriate.			2020	

<sup>8</sup> Effective deployment of new teaching methods requires ongoing investment in information technology infrastructure and in the renewal and modernization of facilities. Plans for these investments, which benefit students and faculty members across campus, can be found in appendices F and G.

EO2 Expanded Centre for Teaching and Learning (CTL)	Increase the resources that will allow the CTL to provide practical supports and training in new pedagogical methods.	2018
EO3 Expanded oversight for graduate supervision and mentorship	Develop guidelines and expectations for graduate supervision.	2017
EO4 Implementation of the University of Alberta Graduate Attributes	Graduate attributes extend the value of disciplinary expertise and prepare students to be the informed, concerned, and involved citizens of the future.	2019
EO5 Improved tracking and management systems for student performance	Implement the Graduate Student Management System.	2018

**Performance Measures – Teaching and Learning**

PM1 Increased use of teaching supports by faculty and teaching assistants		<b>Last Actual 2014-15</b>	<b>Target 2015-16</b>	<b>Target 2016-17</b>	2018
	Number of Graduate Students who Participated in Professional Practice	1645	1645	2000	
	Number of PD-Related Teaching or Professional Practice Sessions	86	86	110	
	Notes:				
	Only includes U of A students.				
	Source: FGSR Statistics				

PM2 Professional skills development in graduate students	Measures of uptake of Faculty of Graduate Studies and Research (FGSR) graduate professional skills development program.			2017	
		<b>Last Actual 2014-15</b>	<b>Target 2015-16</b>		<b>Target 2015-16</b>
	Number of graduate students who participated in professional practice	1,645	1,645		2,000
	Number of professional development-related teaching or professional practice sessions	86	86		110
	Notes:				
Only includes U of A students.					

<b>Goals – Research Excellence</b>		
<b>Type</b>	<b>Description</b>	<b>Expected Completion Date</b>
G6 Research to address global challenges	Pursue excellent, relevant, and high-impact research and encourage interdisciplinary research teams and partnerships with the intent to address complex problems at the local and global scale.	2020
G7 Enhance our research-intensive environment for all levels of study	Ensure a dynamic and strong research community in which the full complement of outstanding faculty, post-doctoral fellows, graduate, and undergraduate students required for enhanced knowledge creation and transmission fully participate in the research mission of the institution. <sup>9</sup>	2020
<b>Priority Initiatives – Research Excellence</b>		
P1 Support areas of emerging and identified strength	Work with the university community and stakeholders to identify areas of collective strength and selectively support them.	2020
P2 Expand collaborative and multidisciplinary research capacity	Build capacity for meaningful research collaborations with industry, community, and post-secondary sector partners, both locally and internationally, to drive high-impact, relevant research.	2020
P3 Increase respect for the reciprocity of research contracts between U of A researchers and their partners from all sectors	U of A researchers will work with community, industry, and academic partners to ensure that the promise of research is fulfilled and conscientiously translated into solutions. In an environment of shifting funding expectations, increased attention to sharing of relevant results and outcomes with all partners, research sensitivity, and knowledge mobilization are key to continuing positive interactions with all partners.	2018
P4 Expand the complement of post-doctoral fellows by identifying avenues to fund costs of the existing and expanded cohort	This talent pool is critical to Alberta’s research capacity and impact, and essential to our role as a global partner of choice for international research consortia and training programs with top-tier collaborators. Post-doctoral fellows drive innovation and research in and out of university settings, including industrial, community, and social settings, and are an important source of future faculty members in many disciplines, as well as serving as highly qualified personnel in government, industry/business, and cultural sectors of society. They are key to shifting Alberta to a learning-	Dependent on funding

<sup>9</sup> Modernization, renewal and repurposing of buildings will provide the infrastructure required to house and support vibrant research programs. Institutional capital priorities are described in detail in Appendix F.

	based society that welcomes intellectual and economic diversity. The funding sources for post-doctoral fellows need to be better understood before a clear target can be established.		
P5 Leverage provincial funding to attract greater external investment from the public and private sectors	Sponsored research is essential to the mission of the U of A, supporting research that addresses key social, cultural, and economic issues on a local and global scale. Provincial research dollars should be matched to other sources (federal and industrial) to maximize value for Albertans.	Ongoing	
<b>Expected Outcomes – Research Excellence</b>			
E01 More meaningful research partnerships between the U of A and stakeholders	Develop criteria for evaluating the effectiveness of partnerships from the perspectives of all stakeholders.	2018	
E02 An expanded and diverse community of post-doctoral fellows	Development of competitive funding packages for post-doctoral fellows. This will drive the establishment of a diverse community of post-doctoral fellows to interact and co-operate between disciplines to inspire novel solutions to complex challenges.	2020	
E03 Expanded supports for early career	Development of early-career researcher supports, including research mentorship, planning, and grant writing skills.	2019	
<b>Performance Measures – Research Excellence</b>			
PM1 Hiring (faculty, post-doctoral fellows, chairs) and funding in research priority areas.	Research priority will be determined as an outcome of the institutional strategic planning process.	Anticipated to begin in 2018	
PM2 Prestigious national and international awards for faculty, post-doctoral fellows, and graduate students.		Ongoing	
			<b>Last Actual 2014</b>
	Faculty awards, U15 relative position		5
Includes Killam Research Fellows and prizes, Royal Society of Canada Fellows and College of New Scholars SSHRC Impact Awards and NSERC prizes awarded during the five-year period 2010 to 2014. In the case of institutions sharing awards, each was given credit for having received the award.			

	<table border="1"> <thead> <tr> <th data-bbox="562 151 919 245">Number of tri-council scholarship awards, U15 relative position</th> <th data-bbox="930 151 1094 245">Last Actual, 2013-14</th> <th data-bbox="1104 151 1268 245">Target, 2016-17</th> </tr> </thead> <tbody> <tr> <td data-bbox="562 253 919 289">SSHRC</td> <td data-bbox="930 253 1094 289">7</td> <td data-bbox="1104 253 1268 289">7</td> </tr> <tr> <td data-bbox="562 297 919 332">CIHR</td> <td data-bbox="930 297 1094 332">3</td> <td data-bbox="1104 297 1268 332">3</td> </tr> <tr> <td data-bbox="562 341 919 376">NSERC</td> <td data-bbox="930 341 1094 376">5</td> <td data-bbox="1104 341 1268 376">5</td> </tr> <tr> <td colspan="3" data-bbox="562 384 1268 420">Source:</td> </tr> <tr> <td colspan="3" data-bbox="562 428 1268 480">U15 tri-council report, includes scholarship awards from CIHR, NSERC, and SSHRC.</td> </tr> <tr> <td data-bbox="562 516 856 639">Post-doctoral fellow tri-council awards, U15 relative position</td> <td colspan="2" data-bbox="867 516 1268 639">Number to come</td> </tr> </tbody> </table>	Number of tri-council scholarship awards, U15 relative position	Last Actual, 2013-14	Target, 2016-17	SSHRC	7	7	CIHR	3	3	NSERC	5	5	Source:			U15 tri-council report, includes scholarship awards from CIHR, NSERC, and SSHRC.			Post-doctoral fellow tri-council awards, U15 relative position	Number to come		
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PM3 Research consortia and partnerships formed with top-tier international partners.	See Appendix C for selective descriptions of active research consortia and partnerships.	Ongoing																					
PM4 Usage of the Grant Assist Program	<p data-bbox="562 800 1518 894">This program improves the quality and competitiveness of applications via enhanced application preparation and support including concept discussion, internal review, feedback, workshops, and writing and editing.</p> <table border="1"> <thead> <tr> <th data-bbox="562 902 1041 971">Grant Assist Program, Number of Reviews</th> <th data-bbox="1052 902 1339 971">Last Actual</th> </tr> </thead> <tbody> <tr> <td data-bbox="562 979 1041 1047">Health Sciences (est. 2010)</td> <td data-bbox="1052 979 1339 1047">1,376</td> </tr> <tr> <td data-bbox="562 1055 1041 1123">Natural Sciences and Engineering (est. 2013)</td> <td data-bbox="1052 1055 1339 1123">214</td> </tr> <tr> <td data-bbox="562 1131 1041 1200">Social Sciences and Humanities (est. 2013)</td> <td data-bbox="1052 1131 1339 1200">226</td> </tr> <tr> <td colspan="2" data-bbox="562 1208 1339 1243">Notes:</td> </tr> <tr> <td colspan="2" data-bbox="562 1252 1339 1287">Data are cumulative since inception.</td> </tr> </tbody> </table>	Grant Assist Program, Number of Reviews	Last Actual	Health Sciences (est. 2010)	1,376	Natural Sciences and Engineering (est. 2013)	214	Social Sciences and Humanities (est. 2013)	226	Notes:		Data are cumulative since inception.		2019									
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<p>PM5 Maintain or improve our relative position in the U15 group of universities for total sponsored research funding.</p>	<p>Maintain or improve our relative position in the U15 group of universities for total sponsored research funding.</p> <table border="1" data-bbox="558 217 1392 428"> <thead> <tr> <th data-bbox="558 217 1008 345"></th> <th data-bbox="1008 217 1136 345">Last Actual 2013-14</th> <th data-bbox="1136 217 1264 345">Target 2014-15</th> <th data-bbox="1264 217 1392 345">Target 2015-16</th> </tr> </thead> <tbody> <tr> <td data-bbox="558 345 1008 428">Sponsored research funding, U15 relative position</td> <td data-bbox="1008 345 1136 428">5</td> <td data-bbox="1136 345 1264 428">5</td> <td data-bbox="1264 345 1392 428">5</td> </tr> </tbody> </table>		Last Actual 2013-14	Target 2014-15	Target 2015-16	Sponsored research funding, U15 relative position	5	5	5	<p>Ongoing</p>
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Sponsored research funding, U15 relative position	5	5	5							
<p><b>Goals – Community Engagement</b></p>										
<p><b>Type</b></p>	<p><b>Description</b></p>	<p><b>Expected Completion Date</b></p>								
<p>G8 Expand community engagement and consultation</p>	<p>Increase community interactions to build two-way relationships with stakeholders on and off campus including urban, rural, Indigenous, and minority communities and their leaders.</p>	<p>2020</p>								
<p><b>Priority Initiatives – Community Engagement</b></p>										
<p>P1 Shared community infrastructure projects</p>	<p>Post-secondary institutions foster the health, talent, skills, and creativity of Edmonton’s people. Shared infrastructure provides essential spaces to support these outcomes, benefiting both the university and its community partners.</p> <p>The <b>Galleria</b> project (Table 8, Appendix F) will expand art, design, and music education, scholarship, performance, and research in the downtown core of Edmonton.</p> <p>The <b>Twin Arenas</b> (Table 8, Appendix F) project will provide needed space for academic, varsity, community and recreational sport activities.</p> <p><b>The Translational Lab</b>—The proposed Diagnostic Centre—will co-house provincial, private, and university labs, supporting translation of medical research. Details on these community partnership projects are listed in Appendix F.</p>	<p>Galleria: 2019 (Table 8, Appendix F)</p> <p>Twin Arenas: 2018 (Table 8, Appendix F)</p> <p>Translational Lab: 2019 (Table 8, Appendix F)</p>								
<p>P2 Increase engagement with communities and stakeholders on and off campus</p>	<p>To be relevant, the university must understand stakeholder needs and challenges. Forums that facilitate two-way exchanges of information and understandings need to be developed along with regularly planned opportunities for exchanges.</p>	<p>2020</p>								



P3 Create partnerships and programs and presentations that include face-to-face interactions	Increase and promote partnerships for community service-learning, co-op, practica, internships and other placements of students in off-campus settings. Develop workshops and presentation formats that include real-time interactions with community members, using Enterprise Square, Campus Saint-Jean, North and South Campus, and Augustana Campus as meeting places.	2020																
P4 Work consultatively with communities, broadly defined, to identify gaps as well as future needs, and build the human capacity to meet them	Develop partnerships that result in community-level capacity building, needs-driven professional programs, and reduced talent drain from communities.	2020																
<b>Expected Outcomes – Community Engagement</b>																		
EO1 Galleria project	Develop plans for completion of the project.	Dependent on government funding																
EO2 Twin Arenas project	Develop plans and partnering relationships for completion of the project.	Dependent on government funding																
EO3 Two-way engagement with communities	Develop and regularly schedule community-relevant events.	2018																
EO4 Partnerships	Increase partnerships for community service-learning and other experiential learning opportunities.	2019																
<b>Performance Measures – Community Engagement</b>																		
PM1 Public interaction	<table border="1"> <tr> <td colspan="2">Community Engagement</td> </tr> <tr> <td colspan="2"><b>Community Engagement</b></td> </tr> <tr> <td></td> <td><b>Last Actual</b></td> </tr> <tr> <td>Co-op participation</td> <td>5,011</td> </tr> <tr> <td>Community Service Learning Course Placements</td> <td>1,506</td> </tr> <tr> <td>Alumni Connections</td> <td>46,420</td> </tr> <tr> <td colspan="2">Notes:</td> </tr> <tr> <td colspan="2">Co-op participation is number of students participating over the most recent five academic years</td> </tr> </table>	Community Engagement		<b>Community Engagement</b>			<b>Last Actual</b>	Co-op participation	5,011	Community Service Learning Course Placements	1,506	Alumni Connections	46,420	Notes:		Co-op participation is number of students participating over the most recent five academic years		2020
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	<p>CSL course placements are for the 2014-15 academic year.</p> <p>Alumni connections include connections with alumni, students, and their guests in the 2014-15 fiscal year.</p>		
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<b>Goals – Infrastructure<sup>10</sup></b>		
<b>Type</b>	<b>Description</b>	<b>Expected Completion Date</b>
G9 Functional renewal and reduction in deferred maintenance	Preserve existing physical assets by addressing deferred maintenance and functional renewal to acknowledge the changes in research and teaching requirements. Reduce the significant risk posed by the current institutional deferred maintenance liability. Details provided in Focus 1 of Appendix F.	Ongoing
G10 Envelope funding for pre-design services.	Pre-design services are critical to prepare for opportunities to implement capital projects more quickly than what has been traditional. Having “shovel ready” projects allows for quick response to funding availability on short notice and creates higher certainty in scope and budget profiles. Details provided in Focus 2 in Appendix F.	Ongoing
G11 Student housing	Accommodation of 18 per cent of full-time students in purpose-built housing featuring supportive programs. ( <i>A Strategy for Student Housing, 2015–2040</i> , Phase 1). Details provided in Focus 3 in Appendix F.	2018
G12 New program space	A number of new spaces are required to support faculty renewal initiatives and to enhance the student experience. Details provided in Focus 4 in Appendix F.	Ongoing
G13 Sustainable development program	Undertake programs and projects that reduce energy consumption, thereby reducing our carbon footprint as well as providing operating efficiencies.	Ongoing
<b>Priority Initiatives – Infrastructure</b>		
P1 Enhancing basic service provision	These projects include the expansion and renewal of basic infrastructure services at all U of A campuses including planning, benchmarking, service reliability, heating and electrical plant expansions, and improvements to deep sewer, water supply, and road lighting. Details provided in Highlights 2014–2015 section of Appendix F.	Ongoing
P2 Pre-design services	Pre-design services will be completed for several buildings including the Medical Sciences, Clinical Sciences, Augustana Science, South Academic, and Mechanical Engineering buildings.	2018

<sup>10</sup> Many of the university’s infrastructure priorities are intrinsic to goals listed in other subsections of this plan. Some capital priorities are so fundamental to the effective operation of the institution as to supersede any one priority area and have been listed here.

P3 Expanding residences	Implement the North Campus portion of Phase 1 of <i>The Strategy for Student Housing, 2015–2040</i> , including 300 new bed spaces for upper-year undergraduates in East Campus Village and 520 new bed spaces for first-year students in a tower on the Lister Hall site.	2018
P4 New buildings	Programming and planning activities will be undertaken for new capital projects including a science facility at Augustana to accommodate more students, a new facility for the Alberta School of Business to accommodate faculty growth, new music and art and design facilities (Galleria), and completion of the Engineering backfill designs.	2017
P5 Research lab ventilation	Optimization of air flows for research labs to reduce exhaust and supply air deliveries (Phase 1 Li Ka Shing, Katz, CCIS and NREF).	2016
P6 People counters (classrooms)	Installation of electronic devices in classrooms that measure occupancy and utilization.	2016
P7 Co-generation	Installation of a gas turbine generator (TG3) with a heat recovery steam generator (HRSG). The intent is to install a natural gas turbine that generates 25 MW of power and simultaneously generates about 70,000 kg/hr of high-pressure steam.	2020
<b>Expected Outcomes – Infrastructure</b>		
EO1 Basic infrastructure added	Basic infrastructure is available in advance of new construction on North and South campuses.	2018
EO2 Continued facility renewal	The Medical Sciences, Clinical Sciences, Augustana Science, and South Academic buildings will be “shovel-ready.”	Ongoing
EO3 Increased residence capacity	Open 300 new student residence bed spaces for upper-year undergraduate students in East Campus Village. Open 520 new bed spaces for first-year students in a fifth tower to be added to the Lister Hall site.	2018
EO4 Space utilization	High-quality programs and planning will ensure efficient and effective use of new space in support of the faculties’ requirements.	2017
EO5 Address climate change objectives	Reductions in electrical use will result in corresponding reductions in greenhouse gas emissions.	2016

EO6 Optimize space utilization	<p>People counter data will be used to provide feedback for ventilation control to supply only the quantity of air equal to the occupant load for energy savings.</p> <p>Another benefit is gathering data for utilization of classroom spaces. A full data set, once compiled, will allow for a determination on shutting down of spaces for summer months, reprogramming of spaces, or targeted renewals to allow for increased utilization.</p>	Ongoing
EO7 Additional co-generation capacity	The expected outcomes are increased reliability, reduction of greenhouse gas emissions, energy cost reduction, and increased efficiency of the district energy system that serves the U of A and its campus partners. Planning and environmental applications must be completed in advance of final design and construction.	2020
<b>Performance Measures – Infrastructure</b>		
PM1	New infrastructure and expansion of existing infrastructure to support the development of the northeast sector of South Campus and the North Campus is installed. (Details provided in Appendix F, tables 8, 9, 10).	2018
PM2	Pre-design documentation to schematic design phase for the Medical Sciences, Clinical Sciences, Augustana Science, South Academic, Business, and Mechanical Engineering buildings will be completed.	2018
PM3	820 new, high-quality student bed spaces are constructed on North Campus, on time and on budget.	2018
PM4 	Functional and general space programming documents are in place for new buildings.	2015–2016
PM5	Direct reduction in electrical utility for the noted buildings and a reduction of greenhouse gas emissions of 10,000 tonnes of CO <sub>2</sub> on an annual basis.	Ongoing
PM6	Energy savings and reduced operating costs.	Ongoing
PM7	Power generated through the new unit will reduce greenhouse gas emissions by 40 per cent compared with conventional power production.	2020

# Appendix A: Financial and Budget Information

## 2016–2017 Consolidated Budget

Prepared under the Public Sector Accounting Standards (PSAS), the University of Alberta's 2016–2017 consolidated budget (see Table 1) reflects the entire enterprise, including unrestricted and restricted funds. Funding for general operations is fully unrestricted within the consolidated budget; funding for ancillary operations remains within those entities and the majority of research revenues, philanthropic sources of revenue, and capital project funding are fully restricted.

For 2015–2016, the university is estimating a consolidated excess of revenue over expense of \$18.3 million—slightly below the budgeted excess of \$23.1 million. Consolidated revenues were \$10 million higher than budgeted, and consolidated expense was \$15 million higher than budgeted.

For 2016–2017, the consolidated budget reflects an excess of revenue over expense of \$38 million on budgeted revenue of \$1,877 million and budgeted expense of \$1,839 million. The \$38-million excess of revenue over expense is equal to two per cent of the university's budgeted consolidated revenue and is driven almost exclusively by excess of revenue within restricted funds.

The Statement of Operations (Budget by Function) under the PSAS and the Statement of Cash Flows Budget are presented in tables 5 and 6.

### **Consolidated Revenue**

Budgeted revenue for 2016–2017 is \$1,877 million. As illustrated in Figure 1, 52 per cent or \$970 million comes from the Government of Alberta, mostly through the Campus Alberta Grant, sponsored research funding, and capital funding. Of the \$970 million, \$621 million represents the Campus Alberta Grant, the primary source of unrestricted funding for the university's day-to-day operating activity. The 2016–2017 budget has been prepared based on a two per cent increase to the Campus Alberta Grant.

Federal and other government revenue of \$184 million largely reflects the funding received by the university in support of its research mandate. This revenue is budgeted to be slightly higher than the 2015–2016 preliminary actuals but lower than the 2015–2016 budgeted revenues. Any change in this revenue source is driven by the federal government's level of investment in Tri-Council funding and the university's national competitiveness in these and other funding competitions.

Tuition and related fees are budgeted at \$334 million and, at 18 per cent, represent the second-largest source of consolidated revenue and are unchanged as a percentage of revenue from 2015–2016. Tuition and related fees include all instructional fees, market modifiers, and non-instructional fees. The fee revenue is largely unrestricted, resides in the operating fund, and is used for the day-to-day general operations of the university. With the passing of Bill 3, all tuition fees falling within the Tuition Fee Regulation and Mandatory Non-Instructional Fees (MNIF) were held at 2014–2015 levels. In December 2015, the Board of Governors approved a 1.6 per cent increase to international student tuition fees for 2016–2017. In future years, the university has forecast all tuition fees under the tuition

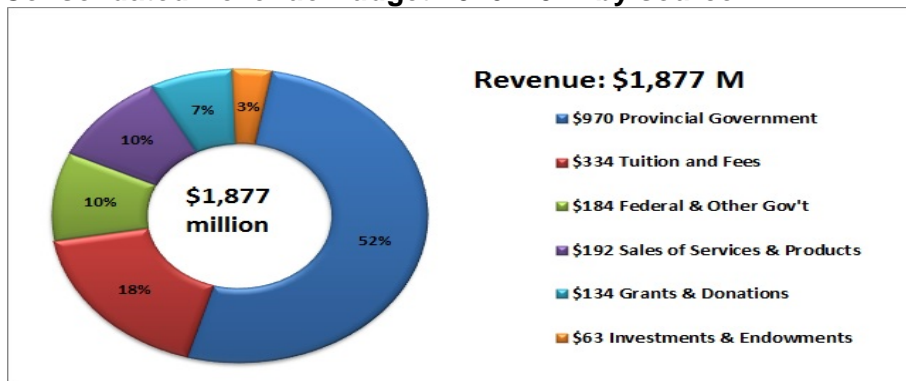
regulation and MNIF to increase by Alberta CPI.

Although international student fees are also forecast to increase at a minimum of Alberta CPI, the university continues to closely monitor overall program costs, market demand, and tuition levels for international students at competing institutions to determine whether additional adjustments in international tuition should be made.

The third-largest sources of revenue include federal and other grant funding as well as sales of services and products. These revenue sources generate \$184 million and \$192 million respectively, and each represent 10 per cent of consolidated revenue. The majority of the federal funding is generated through federal research grants; the majority of sales of services and products are generated through the university's ancillary operations. Increased revenue through ancillary operations is driven by continuing growth in the university's residence capacity as well as the December 2015 board-approved 1.7 per cent base rent increases and differentiated increases to select properties. Parking rates for permits was increased by 1.4 per cent.

The other sources of consolidated revenue for 2016–2017 include grants and donations of \$134 million and investment income of \$63 million.

**FIGURE 1**  
**Consolidated Revenue Budget 2016–2017 by source**



### Consolidated Expense

For 2016–2017, consolidated expense is budgeted at \$1,839 million. For the first time in several years, the budget does not include any across-the-board cuts; however, as of July 1, 2015, all faculties and units assumed responsibility for the funding of across-the-board salary increases and merit.

As Figure 2 illustrates, investments in salaries and benefits to maintain teaching, research, and other critical activities account for over \$1.1 billion or 61 per cent of total expense.

At the time of preparing the budget, the university was still in negotiations with both staff associations. Therefore, the salary and benefit expenditures are based on a forecast adjustment to salaries and benefits. Any final salary and benefit agreement that differs from the forecast will result in a variance to the recommended budget.

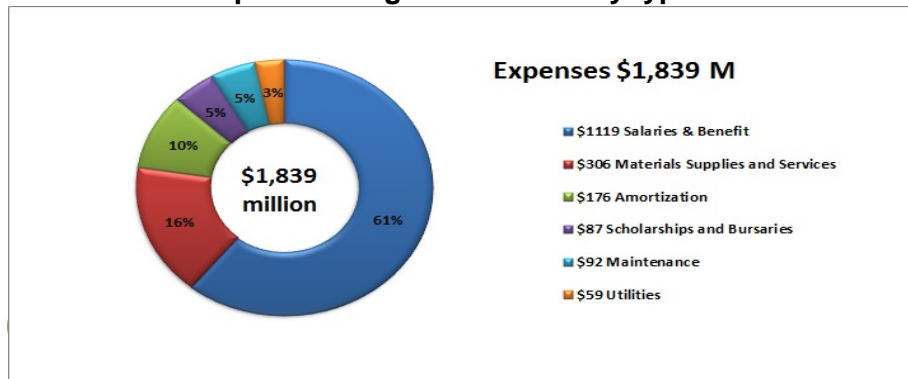
In addition to the negotiated changes to salaries and benefits, the university must also budget for inflationary increases to non-statutory benefits such as supplementary health plans, any statutory benefit increases, and adjustments to pension plan contributions in response to unfunded pension plan liabilities.

The university's next largest expense is materials, supplies, and services. Budgeted at \$306 million, these expenses provide essential support across the campuses, including information systems and technology, research expenditures, library resources, and day-to-day operations such as insurance premiums, communications, and classroom support. This expense line also includes the costs of goods sold and recovered. In budgeting for these expense items, the university continues to face the challenge whereby inflation within higher education significantly exceeds general inflationary pressures. Examples of this include library collections, which are affected not only by general inflationary increases, but also by the value of the Canadian dollar. For 2016–2017, the library collections budget will be increased by 11 per cent or \$2.5 million in response to publisher increases and currency adjustments, with \$1.6 million attributed to the impact of the falling Canadian dollar. Information technology anticipates inflation increases of 6.2 per cent on contracts, plus an additional 2.5 per cent on exchange rates. Facilities and Operations anticipates average inflation increases of 2.9 per cent plus an additional 2.5 per cent due to minimum wage impact and across-the-board merit rollover. These inflationary increases are occurring at a time when the university's grant has increased by two per cent and the majority of tuition revenue has been held at 2014–2015 levels.

A further significant expense in the consolidated budget is \$176 million for the amortization of capital assets. Under the PSAS, amortization is an annual expense that is calculated based on the estimated useful life of the asset. These assets include such things as buildings, scientific and computing equipment, software, and learning resources.

For 2016–2017, scholarship and bursary expenses are budgeted at \$87 million. The decline in scholarship and bursary expense from 2015–2016 is within the restricted special purpose funding, while the scholarship and bursary expense in the operating fund has been increased.

**FIGURE 2**  
**Consolidated Expense Budget 2016–2017 by type**



Consistent with the university's commitment to transparent budget information, in addition to the fully consolidated budget table the university also presents the budget by fund including the university's operating fund (see Table 2).

As noted, the operating fund is unrestricted and is used to support the primary teaching and learning activities of the university. To ensure alignment of the operating fund with the consolidated budget, this fund is presented using PSAS and therefore includes the amortization of capital assets.

For 2016–2017 the university has budgeted total operating fund revenues of \$1,096 million and total operating fund expense of \$1,094 million for an operating fund excess of revenue over expense of \$2 million. The operating fund has been prepared based on the core assumption of a two per cent increase to the Campus Alberta Grant and the freeze in tuition fees and MNIF in 2016–2017 pursuant to Bill 3.



The two primary sources of revenue within the operating fund are the Campus Alberta Grant, and tuition and related fees totalling \$981 million or 89 per cent of the operating fund revenue. The remaining 11 per cent of revenue is derived from federal and other government funding, donations and investment income, and sales of services and products.

Within the operating fund, 75 per cent or \$817 million of expense is associated with salaries and benefits. Ten per cent of expenses are associated with the materials, supplies, and services that support teaching and learning, with the remaining 15 per cent of expense associated with utilities, maintenance, amortization expense, and scholarships and bursaries.

With the provincial government's commitment to reinvesting in higher education, the university received a two per cent grant increase in 2015–2016 and the university has budgeted a further two per cent grant increase in 2016–2017. These actual and budgeted funding increases provided the university a unique opportunity to invest in the academy and position the university for the implementation of its new strategic plan.

As the 2015–2016 grant increase was confirmed later in the fiscal year, the university decided to use that funding on a one-time basis in 2015–2016 and combine it with the 2016–2017 budgeted grant increase of two per cent. This provided the university with over \$25 million in base funding to invest strategically and position the university for the implementation of its new strategic plan in 2016. In 2015–2016 one-time funding of \$10.4 million or 95 per cent of the grant increase was invested in teaching and research priorities, with the goal of further leveraging the \$25 million in base funding in 2016–2017.

In preparing the 2016–2017 budget and in alignment with the university's goals of faculty renewal, student experience, teaching and learning, research excellence, and community engagement, the university developed a four-point budget strategy:

1. Invest the 2015–2016 two per cent grant increase on a one-time basis in 2015–2016 to position the university for its 2016–2017 investments. For 2016–2017, combine the two per cent base fund increases in 2015–2016 and 2016–2017, allowing the university to maximize strategic investment in the academy. Combined, this will allow for a total base investment in the academy of more than \$25 million in 2016–2017.
2. Focus investments on priorities that will have the highest impact on students and members of the university community, such as new academic positions, student funding support, and research.
3. Meet compliance requirements.
4. Maintain institutional supports.

In implementing this four-point strategy the university has made the following base funding investments in the 2016–2017 operating fund budget:

- In support of faculty renewal, the university will invest \$6 million in base funding to renew the professoriate. This will include increasing the number of assistant professors, hiring Indigenous faculty, and increasing diversity within the academy.
- In support of the student experience, the university will invest \$2 million in undergraduate student scholarships and \$0.5 million in programs—all of which will assist in recruiting a more diverse student body and ensuring the well-being of our students.
- In support of teaching and learning, a total of \$1.2 million will be invested in student IT systems to streamline university processes and improve the functionality of the student systems.
- In support of research excellence, the university will invest \$2.4 million in library collections in

an effort to prevent erosion of the collection due to the negative impact of current exchange rates and inflationary pressures. A total of \$0.4 million will be invested in research supports and compliance including the hiring of a dedicated veterinarian.

- In support of community engagement, the university will invest \$2.2 million to increase community interactions, build two-way relationships with stakeholders, and develop partnerships that result in community-level capacity building.

The university continues to be affected by external factors regarding compliance requirements and regulatory issues, as well as the fundamental need to maintain institutional supports such as the basic requirement of the university's heating, cooling, and lighting costs. Consequently, just over \$10 million will be allocated to institutional supports, the largest portion of this being the increasing costs of utilities and the requirement for increasing pension plan contributions. The increase in utility costs in 2016–2017 is the result of the end of a rebate program administered by the utilities ancillary and available to North Campus customers in 2014–2015 and 2015–2016. These rebates were made available through the drawdown of the utilities reserve that had been built up over previous years. Although energy prices have softened, with the conclusion of this rebate program, the university's utility costs are higher in 2016–2017. The balance of the increase in utility costs is due to the timing of gas purchases and the market conditions at the time. Finally, of the \$10 million, \$0.85 million will be invested in Finance and Administration and Facilities and Operations budget pressures.

These strategic investments are being made now to position the university to act quickly on its new strategic plan and further enhance its position as one of Canada's, and the world's, leading comprehensive research-intensive universities.

## Operating Fund Budget Assumptions and Sensitivities

The university prepares its fiscal estimates and final budgets using a comprehensive integrated planning and budget process, involving key stakeholders from across the institution. Key budget assumptions and sensitivities are cornerstones of the university's multi-year budgeting process. The goal is to achieve improved accuracy in forecasting elements of the budget and provide common assumptions for budget planners across the university.

### **2016–2017 BUDGET ASSUMPTIONS**

Key highlights of the university's revenue assumptions include:

- a two per cent increase to the Campus Alberta Grant
- maintaining general tuition increases and MNIF at 2014–2015 levels while increasing international student tuition fees by 1.6 per cent for 2016–2017
- a modest increase in international student enrolment with stable enrolment in domestic students
- a modest recovery in short- and long-term interest rates and investment income following the significant decline in 2015–2016 investment income

Key highlights of the university's expenditure assumptions include:

- salary and benefit adjustments subject to ongoing negotiations
- overall benefit cost increases averaging five per cent

- faculties and administrative units continuing to assume responsibility for the funding of negotiated salary across-the-board and merit
- discontinuation of the utility rebate program at the end of 2015–2016
- a modest increase in scholarship expenditures
- potential Alberta climate change impact

### **2015–2016 BUDGET SENSITIVITIES**

#### Revenue Approximate Value

- one per cent on Campus Alberta Grant: \$6.1 million
- one per cent change on credit tuition: \$3.5 million
- 0.25 per cent on short-term interest rate: \$1.3 million

#### Expense Approximate Value

- one per cent change in salary settlements (AASUA and NASA): \$6.1 million
- one per cent increase in benefits: approximately \$1.4 million
- \$1/gigajoule increase in natural gas: \$2.7 million (ancillary budget)
- one per cent operating budget reduction: \$7 million

### **FORECAST BUDGET ASSUMPTIONS**

The university has used the following forecast budget assumptions.

#### Revenue assumptions:

- The grant will increase at one per cent per year for each of 2017–2018 to 2019–2020.
- Regulated tuition will increase annually by Alberta CPI (approximately 1.6 per cent per year) as confirmed by the ministry.
- All mandatory non-instructional fees will increase by a minimum of Alberta CPI.
- Interest income will remain at historically low levels with some modest recovery.

#### Expenditure assumptions:

- Changes to ATB salary adjustments, merit, and benefit costs will be subject to collective agreement negotiations for 2016–2017 and beyond.
- Faculties and administrative units will continue to have responsibility for the funding of salary across-the-board and merit.
- All other expenditures are forecast to increase in the range of two to 10 per cent.

**TABLE 1  
2016–2017 Consolidated Budget (\$,000)**

	2015-16		Budget	Projections		
	Approved Budget	Prelim. Actuals	2016-17	2017-18	2018-19	2019-20
<b>Revenue:</b>						
Provincial Government	940,491	969,197	969,586	967,311	978,792	994,435
Federal and Other Government	188,997	174,813	183,647	187,516	196,631	209,543
Tuition and Related Fees	333,053	330,391	334,378	343,153	351,434	357,556
Sales of Services and Products	179,292	189,771	192,433	198,249	207,841	213,553
Grants and Donations	107,278	120,579	133,816	128,269	128,219	131,988
Investment income	73,879	48,332	62,743	66,811	72,563	77,986
<b>Total revenue</b>	<b>1,822,990</b>	<b>1,833,083</b>	<b>1,876,603</b>	<b>1,891,309</b>	<b>1,935,480</b>	<b>1,985,061</b>
<b>Expense:</b>						
Salaries	915,941	904,339	930,206	953,463	982,391	1,008,634
Employee Benefits	183,524	186,944	188,462	198,085	209,641	220,763
Materials, Supplies and Services	292,320	293,336	306,371	310,600	320,841	331,717
Utilities	53,808	51,507	58,645	57,403	59,673	61,130
Maintenance	81,663	109,134	91,960	77,515	74,811	75,903
Scholarships and Bursaries	92,719	89,663	87,105	89,932	92,980	96,082
Amortization of Capital Assets	179,841	179,827	176,233	180,015	185,382	191,852
<b>Total Expense</b>	<b>1,799,816</b>	<b>1,814,750</b>	<b>1,838,982</b>	<b>1,867,013</b>	<b>1,925,719</b>	<b>1,986,081</b>
<b>Excess of Revenue Over Expense</b>	<b>23,174</b>	<b>18,333</b>	<b>37,621</b>	<b>24,296</b>	<b>9,761</b>	<b>(1,020)</b>
Investment In Capital Assets	(9,781)	(45,315)	(47,860)	(23,044)	(11,698)	(27,445)
Increase(decrease) for the Year	13,393	(26,982)	(10,239)	1,252	(1,937)	(28,465)
Unrestricted Net Assets, Beginning of Year	(58,349)	(32,234)	(59,216)	(69,455)	(68,203)	(70,140)
<b>Unrestricted Net Assets, End of Year</b>	<b>(44,956)</b>	<b>(59,216)</b>	<b>(69,455)</b>	<b>(68,203)</b>	<b>(70,140)</b>	<b>(98,605)</b>

**TABLE 2  
2016–2017 Consolidated Budget By Fund (\$,000)**

	Operating	Ancillary Operations	Research	Capital	Special Purpose	TOTAL
<b>Revenue:</b>						
Provincial Government	648,722	-	130,235	118,921	71,708	969,586
Federal and Other Government	8,161	-	166,637	8,849	-	183,647
Tuition and Related Fees	332,440	1,938	-	-	-	334,378
Sales of Services and Products	80,300	96,344	3,249	12,390	150	192,433
Grants and Donations	12,957	-	108,769	6,504	5,586	133,816
Investment income	13,975	2	29,320	-	19,446	62,743
<b>Total Revenue</b>	<b>1,096,555</b>	<b>98,284</b>	<b>438,210</b>	<b>146,664</b>	<b>96,890</b>	<b>1,876,603</b>
<b>Expense:</b>						
Salaries	669,122	23,969	193,115	-	44,000	930,206
Employee Benefits	148,155	5,150	25,057	-	10,100	188,462
Materials, Supplies and Services	110,838	24,887	140,556	-	30,090	306,371
Utilities	51,690	6,944	11	-	-	58,645
Maintenance	31,406	24,182	2,854	33,488	30	91,960
Scholarships and Bursaries	35,466	-	42,469	-	9,170	87,105
Amortization of Capital Assets	47,556	10,684	-	117,993	-	176,233
<b>Total Expense</b>	<b>1,094,233</b>	<b>95,816</b>	<b>404,062</b>	<b>151,481</b>	<b>93,390</b>	<b>1,838,982</b>
<b>Excess of Revenue Over Expense</b>	<b>2,322</b>	<b>2,468</b>	<b>34,148</b>	<b>(4,817)</b>	<b>3,500</b>	<b>37,621</b>
Investment in Capital Assets	(28,354)	(5,057)	(1,390)	(13,059)	-	(47,860)
Net Transfers Credit (Debit)	21,297	479	(23,093)	4,817	(3,500)	-
Increase (Decrease) for the Year	<b>(4,735)</b>	<b>(2,110)</b>	<b>9,665</b>	<b>(13,059)</b>	<b>-</b>	<b>(10,329)</b>
Unrestricted Net Assets (Deficiency), Beginning of Year	(174,880)	38,571	63,418	13,675	-	(59,216)
<b>Unrestricted Net Assets (Deficiency), End of Year</b>	<b>(179,615)</b>	<b>36,461</b>	<b>73,083</b>	<b>616</b>	<b>-</b>	<b>(69,455)</b>

# Institutional Budget Risks

As a result of current market conditions, the price of oil, government funding levels, and uncertainty regarding key government policy decisions, the budget risks to the university are substantial.

Specific factors affecting the university's budget risks include the following:

- **Campus Alberta Grant.** High Risk.  
The grant continues to be the university's primary source of unrestricted revenue. With continuing downward pressure on oil and gas prices and low oil and gas price forecasts in the mid-term, provincial government revenues will be constrained, affecting the ability of the government to provide increased funding to the university.
- **Interest Rates.** High Risk.  
With the decline in oil revenue and the sluggish Canadian economy, the Bank of Canada rate remains at unprecedented low levels. The university has forecast a modest recovery in the 2016–2017 rates. If interest rates do not see some recovery, university revenue will be negatively affected.
- **Exchange Rates.** High Risk.  
The Canadian dollar continues to decline against the U.S. dollar with falling oil prices and historically low bank rates. Although a lower Canadian dollar benefits the provincial government in terms of oil and gas revenue and reduces some international students' cost of tuition, a declining Canadian dollar also increases the university's costs for goods and services purchased in U.S. dollars.
- **Compensation.** High Risk.  
The single largest expenditure for the university is employee compensation. Total compensation negotiations with the associations are critical in terms of their impact on the university's budget and forecasts. Through negotiations, the university must achieve alignment between its primary revenue and cost drivers. With faculties and units responsible for the funding of across-the-board and merit, if this balance is not achieved it will trigger further layoffs and deterioration in quality and service levels.
- **Pension Plan Contribution Rates.** High Risk.  
The continuing increase in pension plan contributions represents a significant risk to the university. Without structural reforms to the pension plans, the level of pension plan contributions as a percentage of total benefit costs will become unsustainable.
- **Long-Term Sustainability of Operating Fund.** High Risk.  
The operating fund forecasts a small deficiency in 2017–2018, but the deficiency increases dramatically in 2018–2019 and 2019–2020. This is a result of revenues increasing only marginally with constraints on both grant increases and tuition, while expenses, particularly salary and benefits, are forecast to increase at a much faster rate and compounding each year.

- **Tuition Revenue.** Medium Risk.  
The university requires the ability to adjust tuition levels in response to market demand and conditions. This is particularly true regarding graduate and international student tuition fee levels. If there are constraints on the Campus Alberta Grant, the university must have the flexibility to generate alternative sources of funding to fulfil its academic mission and sustain the quality of the learning experience. With ongoing constraints in government funding, the university must develop a resource management model that will incent the generation of new sources of revenue while more effectively managing its cost drivers and existing resource allocations.
- **Student Enrolment Mix.** Medium Risk.  
Total tuition revenue is driven by tuition levels and a complex mix of student type and degree program. Any variation in student mix between undergraduate and graduate, domestic and international, and level of enrolment in various degree programs can have a negative impact on total tuition revenue.
- **Alternative Revenue.** Medium Risk.  
The university must increase its capacity to generate alternative sources of revenue to offset changes to grant funding, tuition revenue limitations, and low investment income returns. The university requires government support to enable it to generate these new revenue streams. However, these strategies will take several years to be fully implemented and may be subject to significant fluctuations.
- **Land Trust.** Medium Risk.  
The University of Alberta Properties Trust Inc. – this wholly-owned subsidiary of the University of Alberta acts as trustee to manage and develop university-owned lands and to raise dedicated, permanent funding to support the core mission of the university. The Board of Directors is comprised of professionals with expertise in the fields of real estate, land appraisal and development, finance communications and municipal affairs who will act in the best interest of the institution through its developments and to build relationships with neighbouring communities and the City of Edmonton.
- **Equity Issues.** Medium Risk.  
The university has started to undertake a review of data to assess whether equity issues are present within the academic workforce. Although additional analysis is required if equity issues are identified, they will need to be addressed by the university.
- **Minimum Wage Increase.** Medium Risk. The university is facing large increases in contractual obligations from suppliers, driven by increases in minimum wage.

## Capital and Ancillary Budgets

### CAPITAL

The university can only achieve its vision as a leading public institution for higher education serving the public good if it has access to well-supported, well-planned strategic construction of new facilities and repurposing and renewal of its existing facilities. As the university changes, space must transform to meet new needs and requirements. The university's ability to meet its own objectives and those of

the province depends on continued investment for new facilities and for renewal and functional renewal of older facilities.

Table 3 lists the capital projects for 2016–2017. New and continuing capital construction is budgeted at \$117 million of the \$143 million in capital projects which are mainly debt financed. The capital budget also includes just over \$26 million in capital program spending under the infrastructure maintenance and energy management programs. Detailed information on the university's capital plan can be found in Appendix F.

**TABLE 3**  
**2016 - 2017 Capital Budget (\$,000)**

CAPITAL BUDGET FOR 2016-17 (\$000's)					
	Actuals to Date (prelim)	2016-17 + Recommended Budget	+ Forecast to Complete	=	Total Estimated Project Budget
<b>Capital Projects</b>					
Agricultural Research Infrastructure - St Albert / Kinsella / Mattheis	12,327	120	-		12,447
CME Renewal - Levels 2, 3 7	19,962	4,038	-		24,000
Devonian Botanic Garden - Infrastructure Upgrades	150	2,500	10,350		13,000
Devonian Botanic Garden - Islamic Garden	-	5,000	8,000		13,000
East Campus Village - Phase 3	2,500	20,000	17,500		40,000
East Campus Village - Pinecrest & Tamarack	24,161	-	-		24,161
East Campus - Infill	6,850	100	-		6,950
Edmonton Clinic Health Academy	377,740	4,287	-		382,027
HRIF Project (Li Ka Shing / Katz Group ) Fit Outs	107,056	8,924	5,444		121,424
HRIF Project (CTRIC cGMP Fit Out - Li Ka Shing Level 7)	15,777	20	-		15,797
Ice Cores - South Academic Building	500	3,900	-		4,400
Donadeo Innovation Centre for Engineering (ICE)	134,400	-	-		134,400
Lister Tower # 5	1,800	17,000	15,900		34,700
Peter Lougheed Hall (formerly Leadership College)	20,032	22,223	1,710		43,965
Pharmacy Fit Up	44,797	203	-		45,000
Physical Activity & Wellness Centre (PAWC)	56,274	100	-		56,374
Research & Collections Resource Facility (formerly BARD II)	1,219	19,281	9,500		30,000
South Campus - Intersection 63 Ave / 122 Street	4,488	374	-		4,862
Other Capital Projects	31,993	9,212	574		41,779
<b>Total - Projects Underway / Proceeding</b>	<b>862,026</b>	<b>117,282</b>	<b>68,978</b>		<b>1,048,286</b>
<b>Annual Capital Programs:</b>					
Infrastructure Maintenance Program Grant		17,040			
Energy Management		9,000			
<b>Total Annual Capital Programs</b>		<b>26,040</b>			
<b>TOTAL</b>	<b>862,026</b>	<b>143,322</b>	<b>68,978</b>	<b>=</b>	<b>1,048,286</b>
<b>Future Capital Projects</b>					
	<b>2015-2016</b>	<b>2016-2017</b>	<b>2017-2018</b>	<b>2018-2019</b>	<b>2019-2020</b>
Augustana Science Labs & Classroom Building	500	7,500	22,000	28,000	32,000
Campus Saint-Jean Science Labs	-	2,000	20,000	18,000	-
Clinical Sciences Building - Phase 1 Renewal	-	-	2,000	8,000	1,800
Dentistry Pharmacy Functional Renewal Phase 1	-	1,000	20,000	20,000	9,000
Devonian Botanic Garden - Ecological Learning Centre	50	100	10,000	9,850	-
Engineering Backfill Projects	-	8,000	14,000	14,000	-
Heating Plant - Boiler Replacement & Co-gen Turbine	-	4,000	15,000	25,000	33,000
Maskwa House of Learning	2,000	15,000	13,000	-	-
Mechanical Engineering Renewal / Replacement	-	-	5,000	30,000	25,000
Medical Sciences Building - Phase 1 Renewal	-	-	5,000	18,000	7,000
School of Business	-	-	-	2,000	40,000
Science Backfill Projects	-	10,000	9,000	2,000	-
South Campus Basic Infrastructure	-	3,000	7,000	5,600	-
Twin Arenas	-	2,000	30,000	28,000	-
Universiade Pavilion - Building Envelop Replacement	-	-	5,000	10,000	1,000
<b>Total Future Capital Projects</b>	<b>2,550</b>	<b>52,600</b>	<b>177,000</b>	<b>218,450</b>	<b>148,800</b>
The recommended Capital Budget forecast was developed on October 28, 2015 and contains values which may not align with or may not include projects identified in the Comprehensive Institutional Plan.					

The university runs several large ancillary operations: Ancillary Services (Residence Services, Hospitality Services, Parking, Real Estate and Commercial Property Management Services, ONEcard), the University of Alberta Bookstore, Enterprise Square, the University Health Centre, and Utilities.

All of the university's ancillaries must generate the required revenues to support both their operating and ongoing capital requirements, and therefore maintain both operating and capital reserves.

With the exception of the Bookstore, the university's ancillary operations continue to be in strong operating positions while maintaining both operational and capital reserves. The Bookstore continues to undergo significant restructuring in response to fundamental changes in the retail book sector. See Table 4.

**TABLE 4  
2016–2017 Ancillaries Budget (\$,000)**

	2015-16		Budget	Projections		
	Budget	Forecast	2016-17	2017-18	2018-19	2019-20
<b>Ancillary Services</b>						
Revenues	75,575	73,956	77,257	80,210	87,843	91,407
Expenses (Net Amort, Capital Acqn., Debt Rpymt.)	73,167	73,176	79,033	79,386	81,385	101,097
<b>Net Operations</b>	<b>2,408</b>	<b>780</b>	<b>(1,776)</b>	<b>824</b>	<b>6,458</b>	<b>(9,690)</b>
<b>Reserve Balances, Closing</b>						
Operating	1,437	1,265	3,104	4,346	6,016	6,705
Capital	24,205	24,277	20,662	20,244	25,032	14,653
<b>Total Reserve Balance</b>	<b>25,642</b>	<b>25,542</b>	<b>23,766</b>	<b>24,590</b>	<b>31,048</b>	<b>21,358</b>
<b>Augustana: Residence, Conferencing, and Food</b>						
Revenues	3,494	3,424	3,615	3,687	3,761	3,837
Expenses (Net Amort, Capital Acqn., Debt Rpymt.)	3,580	3,709	4,042	3,408	3,464	3,528
<b>Net Operations</b>	<b>(86)</b>	<b>(285)</b>	<b>(427)</b>	<b>279</b>	<b>297</b>	<b>309</b>
<b>Reserve Balances, Closing</b>						
Operating	1,000	432	940	1,151	1,377	1,612
Capital	3,223	4,572	3,637	3,705	3,776	3,850
<b>Total Reserve Balance</b>	<b>4,223</b>	<b>5,004</b>	<b>4,577</b>	<b>4,856</b>	<b>5,153</b>	<b>5,462</b>
<b>Bookstore</b>						
Revenues	14,282	14,326	14,304	14,304	14,304	14,304
Expenses (Net Amort, Capital Acqn., Debt Rpymt.)	14,952	15,200	14,314	14,279	14,325	14,372
<b>Net Operations</b>	<b>(670)</b>	<b>(873)</b>	<b>(10)</b>	<b>24</b>	<b>(22)</b>	<b>(68)</b>
<b>Reserve Balances, Closing</b>						
Operating	(1,134)	(1,193)	(1,203)	(1,179)	(1,201)	(1,269)
Capital	-	-	-	-	-	-
<b>Total Reserve Balance</b>	<b>(1,134)</b>	<b>(1,193)</b>	<b>(1,203)</b>	<b>(1,179)</b>	<b>(1,201)</b>	<b>(1,269)</b>
<b>University Health Services</b>						
Revenues	6,320	6,313	6,600	6,649	6,688	6,732
Expenses (Net Amort, Capital Acqn., Debt Rpymt.)	6,289	6,776	6,497	6,579	6,718	6,799
<b>Net Operations</b>	<b>30</b>	<b>(463)</b>	<b>103</b>	<b>70</b>	<b>(30)</b>	<b>(67)</b>
<b>Reserve Balances, Closing</b>						
Operating	294	263	366	436	405	339
Capital	200	100	100	100	100	100
<b>Total Reserve Balance</b>	<b>494</b>	<b>363</b>	<b>466</b>	<b>536</b>	<b>505</b>	<b>439</b>
<b>Utilities*</b>						
Revenues	95,481	95,126	103,826	103,670	105,088	107,525
Expenses (Net Amort, Capital Acqn., Debt Rpymt.)	102,181	101,826	103,826	103,670	105,088	107,525
<b>Net Operations</b>	<b>(6,700)</b>	<b>(6,700)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Reserve Balances, Closing</b>						
Operating	332	4,742	4,742	4,742	4,742	4,742
Capital	10,117	4,114	4,114	4,114	4,114	4,114
<b>Total Reserve Balance</b>	<b>10,449</b>	<b>8,856</b>	<b>8,856</b>	<b>8,856</b>	<b>8,856</b>	<b>8,856</b>
<b>TOTAL</b>						
Revenue	195,152	193,145	205,602	208,520	217,683	223,805
Expenses	200,169	200,686	207,712	207,323	210,980	233,321
<b>Net Operations</b>	<b>(5,018)</b>	<b>(7,542)</b>	<b>(2,110)</b>	<b>1,197</b>	<b>6,703</b>	<b>(9,516)</b>
<b>Reserve Balances, Closing</b>						
Operating	1,929	5,508	7,948	9,495	11,340	12,129
Capital	37,745	33,063	28,513	28,163	33,022	22,717
<b>Total Reserve Balance</b>	<b>39,675</b>	<b>38,571</b>	<b>36,461</b>	<b>37,658</b>	<b>44,362</b>	<b>34,846</b>



# Conclusion

The university's 2016–2017 budget has been developed around the primary focus of investing in new academic positions and the student experience, while positioning the university for the release of its new strategic plan. Based on current budget assumptions, significant new dollars can be allocated to the hiring of new professors and to key areas that will enhance the student experience. However, the 2016–2017 budget is not without substantial risks.

With the profound drop in the price of oil and a slowing Chinese economy, the global economy is going through a period of dramatic realignment. Some economists argue that this is a structural realignment and not a cyclical one. Consequently, as the impact of a weaker Alberta economy takes hold, all aspects of the Alberta government's revenues are under significant downward pressure including personal income tax, corporate taxes, and royalty revenues. These economic and financial trends create significant budget risks for all of the university's major revenue sources including the Campus Alberta Grant, tuition revenue, interest income, donations, research grant funding, and capital funding.

Within this context and looking forward, in order for the university to be positioned to fully leverage its new strategic plan it must have:

- the flexibility to grow its revenue from non-traditional sources including initiatives such as the Land Trust
- the flexibility to respond to changing market demand for its educational programs and services
- access to resources that will enable it to participate in national and international research collaborations and provide the required infrastructure
- the ability to maximize the use of its existing resources and reallocate them toward emerging priorities

# Statement of Operations Budget by Function and Statement of Cash Flows Budget

**TABLE 5**  
**Statement of Operations Budget for the Years Ending March 31, 2016 to 2020 (\$,000)**

	Estimated Actual 2016	Budget March 31, 2017	Forecast March 31, 2018	Forecast March 31, 2019	Forecast March 31, 2020
<b>REVENUE</b>					
Government of Alberta grants	\$ 969,197	\$ 969,586	\$ 967,311	\$ 978,792	\$ 994,435
Federal and other government grants	\$ 174,813	\$ 183,647	\$ 187,516	\$ 196,631	\$ 209,543
Student tuition and fees	\$ 330,391	\$ 334,378	\$ 343,153	\$ 351,434	\$ 367,556
Sales of services and products	\$ 189,771	\$ 192,433	\$ 198,249	\$ 207,841	\$ 213,553
Donations and other grants	\$ 120,579	\$ 133,817	\$ 128,269	\$ 128,220	\$ 131,988
Investment income	\$ 48,332	\$ 62,743	\$ 66,811	\$ 72,563	\$ 77,966
	\$ 1,833,083	\$ 1,876,603	\$ 1,891,309	\$ 1,935,480	\$ 1,985,061
<b>EXPENSES</b>					
Learning	\$ 1,101,940	\$ 1,131,998	\$ 1,157,389	\$ 1,196,690	\$ 1,232,048
Research	\$ 470,242	\$ 476,452	\$ 481,459	\$ 508,759	\$ 525,959
Facility operations and maintenance	\$ 139,847	\$ 134,716	\$ 120,090	\$ 119,507	\$ 122,061
Ancillary services	\$ 102,721	\$ 95,816	\$ 98,075	\$ 100,763	\$ 106,013
	\$ 1,814,750	\$ 1,838,982	\$ 1,867,013	\$ 1,925,719	\$ 1,986,081
Loss of revenue over expense	\$ 18,333	\$ 37,621	\$ 24,296	\$ 9,761	\$ (1,020)
Accumulated operating surplus, beginning of year	\$ 477,197	\$ 495,530	\$ 533,151	\$ 557,447	\$ 567,208
Accumulated operating surplus, end of year	\$ 495,530	\$ 533,151	\$ 557,447	\$ 567,208	\$ 566,188

**TABLE 6**  
**Statement of Cash Flows Budget for the Years Ending March 31, 2016 to 2020 (\$,000)**

Updated Table to be provided

# Appendix B: Enrolment Plan and Proposed Programming Changes

The strength of the University of Alberta is founded on the quality and diversity of its people, programming, research, and resources. The U of A remains committed to attracting outstanding undergraduate and graduate students, post-doctoral fellows, and professors from Alberta, across Canada, and abroad. Our academy represents Canada's and Alberta's cultural diversity and is an inclusive community that values its founding Indigenous people, minorities, and rural and northern communities. Along with an exceptional and highly skilled technical and professional staff, these individuals create an integrated environment of teaching, learning, research, and creative activities. They enable the breadth and quality that characterizes the university's public and private partnerships in Alberta, its participation in national consortia and initiatives, and its collaborations with top-tier international institutions and agencies.

The U of A aims to provide enriched and transformative student experiences, resulting in graduates who are engaged, global citizens prepared to contribute to the social and economic well-being of the province, the nation, and the world.

Access to programs at the U of A evolves in response to student demand, workforce needs, and new fiscal resources or constraints.

TABLE 7

## University of Alberta: Enrolment Targets Measured in FLEs (Does not include PGME/DE)

2014-15								
	Target				Actuals			
	Undergrad	Graduate Masters	Graduate Doctoral	Total	Undergrad	Graduate Masters	Graduate Doctoral	Total
ALES	1,227	225	215	1,667	1,257	382	297	1,935
Arts	4,871	393	449	5,713	4,893	429	520	5,842
Augustana	899	-	-	899	945	-	-	945
Business	1,786	234	60	2,080	1,791	433	54	2,278
Education	2,551	450	308	3,309	2,468	446	349	3,263
Engineering*	4,020	708	612	5,340	4,166	731	822	5,720
Extension		30	-	30	-	30	-	30
Law	525	4	8	537	525	5	8	538
Medicine & Dentistry**	1,050	259	279	1,588	1,053	345	385	1,784
Native Studies	130	8	-	138	121	10	-	131
Nursing**	1,401	84	84	1,569	1,604	63	74	1,742
Pharmacy	467	15	31	513	474	22	32	528
Physical Education & Recreation	800	55	56	911	854	80	59	993
Rehabilitation Medicine*		835	32	867	2	804	47	853
Saint-Jean	514	28	-	542	528	16	-	544
School of Public Health		147	30	177	-	211	51	262
Science	5,488	517	563	6,568	5,619	651	698	6,969
Open Studies	543		-	543	522	9	-	531
				-				-
<b>Total FLEs</b>	26,272	3,992	2,727	32,991	26,821	4,667	3,398	34,886
* The targets for Engineering UG and Rehabilitation Medicine were changed effective 2014-15 to include newly funded enhanced enrolment FLEs								
** Medicine and Nursing UG targets include FLEs funded by one-time Health Funding that will expire in 2015-16, therefore their targets decrease in 2016-17								
Note: The International enrolment numbers provided here are also included in the overall enrolment numbers provided above.								
	<b>UG</b>	<b>Grad</b>	<b>Total</b>	<b>UG</b>	<b>Grad</b>	<b>Total</b>		
<b>International Enrolment</b>	<b>3,941</b>	<b>2,016</b>	<b>5,957</b>	3,493	3,147	6,640		
	15%	30%	18%	13.02%	39.02%	19.03%		

TABLE 7 CONTINUED

## University of Alberta: Enrolment Targets Measured in FLEs (Does not include PGME/DE)

2015-16								
	Target				Estimated Actuals			
	Undergrad	Graduate Masters	Graduate Doctoral	Total	Undergrad	Graduate Masters	Graduate Doctoral	Total
ALES	1,227	225	215	1,667	1,240	361	283	1,884
Arts	4,871	393	449	5,713	4,837	376	480	5,693
Augustana	899	-	-	899	908	-	-	908
Business	1,786	234	60	2,080	1,791	431	50	2,272
Education	2,551	409	349	3,309	2,554	467	297	3,318
Engineering*	4,180	708	612	5,500	4,140	659	813	5,612
Extension	-	30	-	30		32	-	32
Law	525	4	8	537	550	6	8	564
Medicine & Dentistry**	1,045	259	279	1,583	1,075	332	395	1,802
Native Studies	130	8	-	138	114	15	-	129
Nursing**	1,384	84	84	1,552	1,471	56	72	1,599
Pharmacy	467	15	31	513	481	25	35	541
Physical Education & Recreation	800	55	56	911	823	77	59	959
Rehabilitation Medicine*	-	835	32	867	3	882	50	935
Saint-Jean	514	28	-	542	519	17		536
School of Public Health		147	30	177		176	55	231
Science	5,488	517	563	6,568	5,357	630	628	6,615
Open Studies	543	-	-	543	583	10	-	593
				-				-
<b>Total FLEs</b>	26,410	3,951	2,768	33,129	26,446	4,552	3,225	34,223
* The targets for Engineering UG and Rehabilitation Medicine were changed effective 2014-15 to include newly funded enhanced enrolment FLEs								
** Medicine and Nursing UG targets include FLEs funded by one-time Health Funding that will expire in 2015-16, therefore their targets decrease in 2016-17								
<b>Note: The International enrolment numbers provided here are also included in the overall enrolment numbers provided above.</b>								
	<b>UG</b>	<b>Grad</b>	<b>Total</b>	<b>UG</b>	<b>Grad</b>	<b>Total</b>		
<b>International Enrolment</b>	<b>3,941</b>	<b>2,016</b>	<b>5,957</b>	3,493	3,147	<b>6,640</b>		
	15%	30%	18%	13.02%	39.02%	<b>19.03%</b>		

TABLE 7 CONTINUED

## University of Alberta: Enrolment Targets Measured in FLEs (Does not include PGME/DE)

	2016-17 Target				2017-18 Target			
	Target				Actuals			
	Undergrad	Graduate Masters	Graduate Doctoral	Total	Undergrad	Graduate Masters	Graduate Doctoral	Total
ALES	1,227	225	215	1,667	1,227	225	215	1,667
Arts	4,871	393	449	5,713	4,871	393	449	5,713
Augustana	899	-	-	899	899	-	-	899
Business	1,786	234	60	2,080	1,786	234	60	2,080
Education	2,551	409	349	3,309	2,551	409	349	3,309
Engineering*	4,340	708	612	5,660	4,500	708	612	5,820
Extension		30	-	30		30	-	30
Law	525	4	8	537	525	4	8	537
Medicine & Dentistry**	1,040	259	279	1,578	1,040	259	279	1,578
Native Studies	130	8	-	138	130	8	-	138
Nursing**	1,354	84	84	1,522	1,354	84	84	1,522
Pharmacy	467	15	31	513	467	15	31	513
Physical Education & Recreation	800	55	56	911	800	55	56	911
Rehabilitation Medicine*		835	32	867		835	32	867
Saint-Jean	514	28	-	542	514	28	-	542
School of Public Health		147	30	177		147	30	177
Science	5,488	517	563	6,568	5,488	517	563	6,568
Open Studies	543		-	543	543		-	543
				-				-
<b>Total FLEs</b>	26,535	3,951	2,768	33,254	26,695	3,951	2,768	33,414
* The targets for Engineering UG and Rehabilitation Medicine were changed effective 2014-15 to include newly funded enhanced enrolment FLEs								
** Medicine and Nursing UG targets include FLEs funded by one-time Health Funding that will expire in 2015-16, therefore their targets decrease in 2016-17								
<b>Note: The International enrolment numbers provided here are also included in the overall enrolment numbers provided above.</b>								
	<b>UG</b>	<b>Grad</b>	<b>Total</b>	<b>UG</b>	<b>Grad</b>	<b>Total</b>		
<b>International Enrolment</b>	<b>3,980</b>	<b>2,016</b>	<b>5,996</b>	<b>4,004</b>	<b>2,016</b>	<b>6,020</b>		
	15%	30%	18%	15%	30%	18%		

TABLE 7 CONTINUED

## University of Alberta: Enrolment Targets Measured in FLEs (Does not include PGME/DE)

	2018-19 Target			
	Actuals			
	Undergrad	Graduate Masters	Graduate Doctoral	Total
ALES	1,227	225	215	1,667
Arts	4,871	393	449	5,713
Augustana	899	-	-	899
Business	1,786	234	60	2,080
Education	2,551	409	349	3,309
Engineering*	4,500	708	612	5,820
Extension		30	-	30
Law	525	4	8	537
Medicine & Dentistry**	1,040	259	279	1,578
Native Studies	130	8	-	138
Nursing**	1,354	84	84	1,522
Pharmacy	467	15	31	513
Physical Education & Recreation	800	55	56	911
Rehabilitation Medicine*		835	32	867
Saint-Jean	514	28	-	542
School of Public Health		147	30	177
Science	5,488	517	563	6,568
Open Studies	543		-	543
				-
<b>Total FLEs</b>	26,695	3,951	2,768	33,414
	<b>UG</b>	<b>Grad</b>		<b>Total</b>
<i>International Enrolment</i>	<i>4,004</i>	<i>2,016</i>		<i>6,020</i>
	15%	30%		18%

## **ENROLMENT PLAN AND PROPOSED PROGRAMMING CHANGES**

### **Student Retention and Completion**

Students arrive on our campuses differently prepared to face the challenges and to make full use of the opportunities of post-secondary education. We must provide relevant services and supports for building strong campus communities that aid our students' transition to university learning so they flourish as thinkers and problem-solvers. These include:

- bridging or transition year programs for Indigenous and international populations that respect different demographic characteristics and ways of knowing and, for example, address preparation gaps in writing
- transition supports for first-generation (or "first in family") university students, such as study skills and other supports for academic success
- support for social connections on campus, such as strong student groups, social and cultural opportunities, and extracurricular programming
- expanding rural access and supports to ensure success, such as distance access to North Campus tutors and library materials
- distance opportunities to engage with North Campus classes, effectively increasing course availability for general-population courses as well as very specialized courses to students on other U of A campuses, distance learners, and students at other post-secondaries to enhance program depth and flexibility.

### **Student Experience**

Investing in wellness and mental health services and supports allows a preventive approach to increasingly common difficulties experienced by students. Creating an inclusive and welcoming campus environment that supports student mental health and wellness requires an institution-wide, community-based approach and a strong central network of supports and services that has multiple points of entry for students, including:

- counselling and clinical services designed to be as accessible as possible to all students, staff, and faculty
- the Community Social Work Team, the first of its kind in North America, which provides a variety of programming and tools designed to reduce loneliness and isolation to students of all ages, groups, backgrounds, and income levels
- enhancing mental health literacy, including expanding online access to information and resources for underserved student populations
- implementing a Campus Wellness Initiative that goes beyond the absence of illness and negativity and facilitates flourishing in the U of A context
- upgrading the physical plant for an accessible and welcoming campus for students with physical disabilities
- well-designed and vibrant student residences to raise student retention and completion rates, provide a more pronounced sense of belonging to their social environments, and encourage greater participation in other extracurricular campus activities that further enhance the student experience
- purpose-built student residences for early-year students
- institution-wide attention to safe campuses as free as possible from harassment and other negative social encounters, along with a strong and brisk response to violations of safety and dignity of all members of the university community
- overall attention to the strength and positivity of the campus community including diverse and inclusive student groups, activities, study spaces, and early provision of preventative measures to assure student confidence and success before severe problems are encountered



## **Increasing National Recruitment of Undergraduates**

Between 2010–2011 and 2014–2015, total undergraduate student enrolment at the U of A increased only marginally (by 0.3 per cent) compared with graduate enrolment, which has increased significantly over the same period. A national recruitment strategy for the U of A has the potential to diversify our undergraduate student body, broadening perspectives on national and global issues, increasing cross-national understanding, and improving communication skills. The majority of our undergraduates (e.g., 73 per cent in Fall 2015) come from schools within Alberta, leaving room to recruit students from across Canada and around the world.

## **Quality Degree Programs**

The U of A offers foundational and relevant programs with the goal to educate every student as an engaged and informed citizen and lifelong learner, whether as a highly skilled professional, a scholar, an artist, or a scientist. We provide a sophisticated layering of credentials through programming designed to meet the needs of all learners seeking baccalaureate credentials and higher, through to the highest professional and scientific designations. Employers consistently report that the knowledge and skills gained through high-quality liberal arts education, though not directed to any particular profession, most effectively prepare students to tackle complex challenges with critical thinking skills, creativity, and cultural sensitivity.

Alongside traditional degree programs there is growing interest in, and need for, joint degrees, interdisciplinary programs, and cross-disciplinary embedded certificates. New programs and content captures and models diversity not only in content, but also in approach to studying problems and implementing solutions. New approaches to higher education include regular evaluation of programs, allowing for refreshing and phasing out of programs not sufficiently responsive to current educational, economic, and scientific needs alongside the development of new ones.

Opportunities for enhanced learning and skill development, including experiential and co-operative learning, community service-learning, internships, and our suite of international opportunities, such as the School in Cortona and the e3 program in Berlin, Brazil, and Washington, fuse academic pursuit with real-life experience and help students to expand and enhance cross-cultural communication and competency as they prepare to work in an increasingly diverse and international workplace.

- In the last three academic years, approximately 7.3 per cent of undergraduates at the U of A have participated in for-credit co-operative education and internship programs. The U of A endeavours to increase the proportion of students involved in experiential learning through the development of alternative course delivery formats, as well as increasing partnerships with diverse communities.
- In 2013–2014, approximately three per cent of all U of A students participated in experiences abroad, marginally above the average for Canadian universities (2.6 per cent). Though increasing, this rate remains well below that of other OECD countries. The U of A endeavours to increase the proportion of students enriched by international experiences by expanding study abroad and foreign exchange programs, allowing for appreciation of what it's like to experience internationality and diversity at home and abroad, through sharing and discovery.
- The U of A has specified learner outcomes related to leadership, citizenship, and general workforce preparedness, including ethical responsibility, creativity, and confidence planned to be achieved through traditional scholarship as well as engagement with communities, industries, not-for-profits, and other organizations; international experiences; and more basic things such as communication skills, presentation skills, critical thinking and problem-solving skills, and social skills. Faculties are supporting the breadth of such outcomes by focusing on their own strengths.

## **Continuing Education/Professional Education**

Learning and professional development is now a lifelong expectation. Highly skilled professionals return to the university to explore newly created knowledge and cutting-edge practice, and to increase technical knowledge. Increasing numbers of people seek flexible, accessible opportunities throughout their careers to attend courses and programs of interest, extend professional credentials, increase technical knowledge and expertise, and prepare for career transitions.

Advanced professional degrees are increasingly in demand to fill important knowledge gaps created by the combination of shifts in industry practices, shifts in professional education, and shifts in expectations regarding credentials and social and environmental responsibility. What was previously achieved with an undergraduate degree and 20 years of experience is now achieved with a graduate designation (typically master's level), whether or not it is taken immediately following completion of the undergraduate credential. Furthermore, there is both economic impact and industry capital in having high-quality advanced professional degrees delivered at a price consistent with market value. Underpricing professional credentials creates reputational risk regarding the quality of the programming. In this domain, the price tag signals the peers (that is, the competitive frame). Elite programming such as the MBA, MEng, Law (JD), PT, OT, MPH, and MD fill critical roles in the health, social, and economic fabric of the province and the country. Such designations compete on a global stage with the best in the world including Stanford, Oxford, National University of Singapore, University of Melbourne, Osaka University, University of Sheffield, and the University of Illinois and University of California groups, as well as our Canadian peers, the universities of Toronto and British Columbia, where the quality of the program is frequently judged by its price tag. The U of A has several such programs and is actively developing such programs and competing for students and reputational advantage. North American students now shop for such programs on the global market. In the fast-changing knowledge economy, there is a growing marketplace for top professional post-graduate opportunities.

- Highly skilled professionals return to the university to increase technical knowledge (e.g., master's degrees in public health, community management, recreation, and community development).
- The Faculty of Graduate Studies and Research professional development program advances research and develops professional skills and qualities sought by employers, making the U of A's graduate students competitive in the global market for traditional educational positions (e.g., professors), industry positions (e.g., industrial research and development) and within communities (e.g., government officials).

## **Accessible, Flexible, Focused Education Delivered in Diverse and Novel Ways**

The U of A strives to support diverse learning pathways to ensure that a broad range of students' objectives and contributions to the knowledge and general economy are provided. Reaching these goals requires updates to key IT infrastructure and the expansion of the Centre for Teaching and Learning to support the professoriate in the use of e-learning delivery. Creative scheduling that provides more accessibility to a diverse student population and makes better overall use of facilities year-round will also be explored.

# Appendix C: Research, Applied Research, and Scholarly Activities

As a comprehensive research-intensive university, the University of Alberta holds a primary responsibility for research and innovation in programming, and in training future researchers and innovators across disciplines and all levels of study. Groundbreaking research focuses on redefining the social, cultural, environmental, and technological contexts that we will need in the future. For example, teacher education must evolve to address new demands in schools where increased population diversity, as well as shifts in employment and industry, are influencing both what and how we teach our children. Similar demographic changes are influencing the delivery of health care and health information. Increased use and fast-paced changes in communications technology are influencing how people access, consume, and critically examine information—all skills that university graduates need.

The U of A continues to build and support collaborative research capacity to produce leading-edge research on critical issues that confront humanity. Bringing together areas of identified research strength that contribute to interdisciplinary, multidisciplinary, and cross-disciplinary projects and approaches, collaborative research tackles the many urgent social, technological, and economic problems we face now and in future. For example, fast changes in the energy sector including global competition, changes in fossil fuel extraction and expectations about environmental stewardship, increased expectations for alternative sources of energy, and increased demands for technically prepared workers and greater diversity in the workforce at all layers of the industry must be taken up in research, discovery, and evaluation.

## **Research Quality and Impact: Awards, Recognition, Measures**

Over the last decade, U of A researchers have attracted total sponsored research funding in excess of \$4.6 billion, putting the U of A fourth among Canada's research-intensive universities. On an annual basis, sponsored research funding has averaged more than \$400 million per year, with a peak value of \$536 million in 2010–2011. In both 2009–2010 and 2012–2013 (the most recent years in which complete data are available), the U of A ranked third in the U15 for sponsored research income per full-time teaching faculty. U of A research also ranked third among U15 peers in numbers of publications and fifth in number of citations from 2010–2014.

Past provincial investment has ensured that the University of Alberta has been able to build prominent international collaborations, make significant contributions to areas of fundamental importance to Albertans (including energy and the environment, health, and economic diversification), and to recruit and train the innovative leaders of tomorrow. Additional support would enable the U of A to better leverage provincial funding to attract greater external investment from the public and private sector, including participation in prominent federal funding programs such as the Canada First Research Excellence Fund (CFREF), and foster long-term cycles of significant re-investment in Alberta.

Aside from the critical role that a robust research-intensive institution plays in the social, economic and cultural well-being of Alberta, the importance of sponsored research to the institution is that it effectively enhances the overall operating budget of the university. It provides support for research projects that otherwise would not be possible, including providing training and financial support for graduate students, as well as jobs for research coordinators, technicians, and other services.

However, a strong research enterprise also places a burden on the university, because research funding covers only a portion of the costs. Without indirect costs of research being paid adequately, the research enterprise suffers and this affects all activities.

### **Research Resources**

Core facilities are a natural requirement of the university's diverse research and training programs. Excellent core facilities contribute to determining the quality and the functionality of Alberta's overall research and innovation capacity. Core facilities support discovery, and the translational and pre-commercialization research activities that are vital to our institutional strength, and also support the translation of research discoveries to end-user groups and communities. The U of A's research partners include the Helmholtz Association of German Research Centres, Tsinghua University, the World Universities Network (WUN), the Canadian Glycomics Network, and many others.

### **Global Engagement**

Global engagement is vital to high-quality research efforts. The development of multinational or global research networks expands institutional capacity to address complex global issues in a more robust and efficient way. Creative solutions to complex problems can be readily shared across communities and nations through collaborations with other academic organizations, businesses and industry, non-profits, and government agencies. The U of A seeks an investment to sustain and advance strategic international partnerships of direct benefit to Alberta that will:

- foster the global exchange of talent and expertise
- increase exposure to a diversity of thinking on global issues
- enhance access to a wider variety of research infrastructure, knowledge, resources, state-of-the-art equipment, and advanced techniques

The Office of the Vice-president of Research advocates for and supports the U of A's global research endeavours. Significant international research collaborations also emerge and are sustained at the unit, program, and faculty level. The following is a selection of international research activities overseen by the Office of the VPR.

### **Specifics**

- Germany: \$3 million per year for five years to continue collaboration with the Helmholtz Association and the numerous partnerships this collaboration fosters.
- China: \$3 million per year for five years to foster linkages with Tsinghua University, one of the world's leading universities with particular expertise in the areas of energy and environment.
- France: \$1 million per year for five years to foster the France-Alberta Science and Technology Initiative (FAST).

### **Activities Related to the University's Priority Countries**

#### **China**

- Tsinghua University - SCENEREI (Sino-Canada Energy and Environment Research and Education Initiative): Funding was secured from the provincial government and leveraged through the faculties of engineering, science, and business. With these funds, 24 joint research projects with collaborators in China are currently funded until January 31, 2017.
- MOST (Ministry of Science and Technology): A proposal to Alberta Innovation and Advanced Education for an additional \$500,000 grant to pursue activities with China under the Joint Research Labs program was approved, and the U of A was awarded the funding in March 2015. Some joint China-U of A projects have been identified and formal proposals for funding are pending.

## Germany

- Helmholtz-Alberta Initiative (HAI): A five-year extension of the memorandum of understanding in HAI between the Helmholtz Association and the U of A was signed in September 2014. Areas of research focus in HAI include:
  - Energy and Environment (HAI-E&E)
  - Infectious Disease (HAI-IDR)
  - Neurodegenerative Disease (HAI-NDR)
  - Diabetes
- Fraunhofer: A Memorandum of Agreement (MOA) was established between the Fraunhofer Institute for Process Engineering and Packaging (IVV) and the Fraunhofer Institute for Environmental, Safety, and Energy Technology (UMSICHT) together with the U of A,
  - A Fraunhofer-Alberta Collaborative Workshop on the Fraunhofer-Alberta biobattery project was held with representatives from organizations such as the Government of Alberta (Ministry for Economic Development and Trade), the three Alberta Innovates corporations (AI-EES, AI-Bio and AI-TF), the City of Edmonton, Alberta Municipalities, and industry.
- Leibniz: Initiatives between the Leibniz Association and the U of A in the areas of digital humanities (e.g., Science 2.0 and Citizen Sciences) and digital education are under development.
- DAAD (German Academic Exchange Service) and a delegation of presidents of German universities and DAAD North America visited the U of A on May 3–4, 2015, with the aim of boosting further development of Canadian-German science relations.

## Activities Related to Other Countries

### France

- FAST! (France-Alberta Science and Technology Initiative): The Office of the VPR, through the HAI team, worked closely with University of Alberta International and the French Embassy to facilitate a panel discussion on campus Oct. 29, 2015, with a focus on climate change and energy transition. The event was part of a series of French Ameri-Can Climate Talks (FACTS) across Canada and the United States in preparation for the UN-led COP21 climate conference that took place in Paris in December 2015.
- INRA (French National Institute for Agriculture Research): A workshop on France/U of A Food and Agriculture Research and Innovation was held in Edmonton Nov. 4–5, 2015. The event included more than 30 participants from Alberta Innovates - Bio Solutions; the Faculty of ALES; Alberta Agriculture and Forestry; Alberta Economic Development and Trade; the Consulate General of France Office in Vancouver; MITACS; and INRA. This introductory gathering led to discussions about student exchanges and possible joint application to NSERC/ANR (French National Research Agency) on meat quality and safety.

### Mexico

- SENER (Mexican Ministry of Energy): Provost and Vice-president (Academic) Steven Dew signed a letter of intent Dec. 4, 2015, with SENER. The Agreement focuses on facilitating work on hydrocarbons, and it is anticipated that this new collaboration will stimulate the exchange of graduate students and professors working on topics of mutual interest, and possibly lead to joint certificate or master's programs.

## India

- IC-IMPACTS (India-Canada Centre for Innovative Multidisciplinary Partnerships to Accelerate Community Transformation and Sustainability): Now in its third year of operation, IC-IMPACTS continues to focus on change for local communities in both India and Canada. It currently has 158 researchers involved, is training 327 highly qualified personnel (HQP), and has funded 29 research projects. The IC-IMPACTS innovative Summer Institute is an annual program that equips Canadian and Indian graduate students with skills in research, innovation, commercialization, and leadership. The 2016 Summer Institute will be held in Edmonton from May 29 to June 3, 2016, and will focus on nanotechnology in the areas of infrastructure, water, and health.

## Other

- Worldwide Universities Network (WUN): The U of A joined this network of 18 research-intensive institutions across Europe, North America, Africa, Asia, and Oceania in 2008. WUN creates opportunities for international collaboration and gives the U of A an international voice in terms of its research strengths and contributions.

## Research Excellence

As one of Canada's excelling research-intensive institutions, the U of A leads the province in world-class research outcomes and student experiences that drive innovation and enhance social, cultural, and economic development. The university offers research and doctoral programs across seven thematic areas: humanities and fine arts, social structure and systems, science and technology, energy, environment, food and bio-resources, and health and wellness. This full spectrum of inquiry positions the U of A's academy and its graduates to make the comprehensive contributions towards scientific, social, and cultural innovations needed to support the goals Alberta has set for itself: effective resource and environmental management, a broadened economic base, and resilient and healthy individuals and communities. Research must be recognized as an important career path in itself that supports these provincial aspirations.

## Ensuring Future Faculty Excellence

The U of A is home to 2,038 full-time faculty members (347 assistant, 745 associate, 946 full) and 922 contract academic staff. Over the history of the university, their distinctions have been many, including 41 3M National Teaching fellows, 60 members of the Order of Canada, 138 fellows of the Royal Society of Canada (including three members of the newly formed RSC College of New Scholars, Artists, and Scientists), 20 members of the Alberta Order of Excellence, and 11 winners of the Queen Elizabeth II Diamond Jubilee Medal.

These successes demonstrate that U of A faculty excel in their work, yet there are demographic challenges on the horizon. Since the end of mandatory retirement in 2007, which coincided with the beginning of a series of base budget cuts, the average age of a professor at the U of A has risen to 47.6 years (48 for men and 46.9 for women). The number of assistant professors has dropped nearly 40 per cent since 2009–2010, largely due to budget cuts impairing hiring; conversely, the number of full and associate professors has steadily increased, reflecting the natural career progression of successful scholars and scientists in the university environment. Since 2006–2007, the number of contract academic staff has also been growing in proportion to the overall number of faculty members, reflecting the need to continue to offer classes beyond the capacity of the professoriate.

## **Renewing Our Faculty**

The lack of new assistant professors puts research capacity and the quality of student educational experiences at risk. Without renewal, the U of A will have a reduced capacity to develop early-career leaders who will explore emerging fields, embrace new pedagogical methods, and sustain our overall research productivity. Renewing the professoriate is now urgent. The U of A has a strategy for achieving 40 new assistant professors over the next 18 to 24 months, pending expected budget stability. An optimal ratio is about 60 per cent assistant and associate professors, and about 40 per cent full professors. This is due to the desirable reality that professors will fulfil their careers at the university. Professors are with us for 20 to 30 years after promotion. Assistant professors must achieve promotion in no more than seven years, and most associate professors achieve promotion in about five years. Thus, less time is spent in the first two ranks (about 10–12 years), with the large majority of time in the senior rank (about 20 to 30 years in a substantial career).

The U of A must also bridge a critical gender gap in the professoriate, particularly in the most senior ranks. Despite long-term efforts to achieve gender balance in the academy, male faculty members currently outnumber female faculty nearly two to one.

Finally, the U of A must strive to increase the representation of Indigenous scholars in the professoriate. Presently, they comprise only one per cent of the professoriate, whereas the population level of Indigenous people is about seven per cent. It must be acknowledged that Indigenous people achieve higher education at the rate of about 12 per cent, only about half the rate among the general population (about 23 per cent). The U of A, in partnership with other post-secondaries, must simultaneously address this education gap and the professoriate gap, in full recognition that success in the latter will have profound effects on the former. The U of A must partner with other Western Canadian institutions to increase the number of PhD-level Indigenous scholars to even create enough trained scholars to take up positions in universities.

## **Balance of Professors, Post-doctoral Fellows, Graduate Students and Undergraduate Students**

In 2014–2015, the U of A was home to 37,749 students (30,189 undergraduate and 7,572 graduate). We are home to 2,038 full-time faculty members, approximately 600 post-doctoral fellows, and 922 contract academic staff. Maintaining the right balance among professors, post-doctoral fellows, graduate, and undergraduate students is critical to the university's ability to offer access to a world-class education and an environment that nurtures and supports the full educational and career life cycle of all U of A members.

## **Graduate Education and Post-doctoral Fellows**

Over 200 graduate programs, attended by 7,572 graduate students and nearly 600 post-doctoral trainees, are all intricately entwined with the U of A's learning, teaching, and discovery mandate. Individuals educated to the PhD level enable large-scale, visionary, and sometimes risky research agendas. They drive innovation and research in and out of university settings, including industrial, community, and social settings. They are key to shifting Alberta to a learning-based society that welcomes intellectual and economic diversity.

The Faculty of Graduate Studies and Research Professional Development program advances research and develops professional skills and qualities sought by employers, making the U of A's graduate students competitive in the global market for traditional educational positions (e.g., professors), industry positions (e.g., industrial research and development) and within communities (e.g., government officials).

The post-doctoral complement is critical to Alberta's research capacity and impact, yet receives no provincial support. Post-doctoral fellows are essential to our role as a global partner of choice for

international research consortia and training programs with top-tier collaborators. An expanded and diverse community of post-doctoral fellows will contribute to U of A capacity to discover novel solutions to complex social, cultural, and economic challenges. The cost of a post-doctoral fellow stipend is approximately \$50,000 per annum. Cohort targets will be determined in response to the U of A strategic plan. This does not include the training component (i.e., the same level of expenditure as graduate students who are funded on a per capita basis).



# Appendix D: Community Outreach and Under-represented Learners

In 2014–2015, half of all undergraduates at the University of Alberta came from outside Edmonton. In the Fall of 2015, 73 per cent of all undergraduates at the U of A came from schools within Alberta, mostly from the cities of Edmonton, Calgary, and Red Deer. By increasing enrolment of under-represented students from Indigenous, rural, Francophone, and northern communities, the U of A can help to build creative, innovative, flexible, and sustainable communities across the entire province, as communities' capacity to tackle complex social, economic, and technological challenges is enhanced by educational attainments. Partnerships are needed that increase the probability that graduates will return to or newly join communities outside the major centres. Programs in the Faculty of Medicine and Dentistry have successfully placed medical professionals in such communities using practicum placement opportunities to introduce non-rural students to these communities. Such community capacity building will encourage more highly trained people to choose to join those communities.

## **Indigenous Learners**

Indigenous students continue to be substantially under-represented in any student population. Self-identified Indigenous enrolment at the U of A is three per cent in 2015–2016, up marginally from 3.2 per cent in 2012–2013. Augustana Campus boasts seven per cent Indigenous enrolment, highlighting the importance of diverse learning opportunities within the U of A context. Augustana offers a smaller, rural-based context that can be more comfortable for Indigenous learners from small communities themselves. The university houses the only Faculty of Native Studies in Canada, established in 2006. Student-focused and research-intensive, the faculty is ideally positioned to offer Indigenous students more tailored versions of the services, academic support, social and recreational opportunities, and community life that the university offers more generally.

Indigenous students continue to be under-represented in Alberta's higher education institutions, with only 48.4 per cent of Indigenous Albertans who live off-reserve obtaining post-secondary qualifications, compared with 62.8 per cent of non-Indigenous Albertans. The university is committed to closing this education gap in pursuit of a more prosperous, socially inclusive, and equitable society. The post-secondary sector is vital to providing future generations of Albertans with the knowledge and tools to be actors of positive change in their communities.

## **Indigenous Initiatives in a Time of Reconciliation**

As Alberta's largest post-secondary institution, the U of A has both the capacity and capability to influence the knowledge base of the next generation of Albertans, and consequently, has an important role to play in the reconciliation process. With the only stand-alone Faculty of Native Studies in Canada, the university is well positioned to become an exemplar in the following areas:

- Indigenize university curricula (research-based curricula that increase student exposure to the histories, cultures, beliefs, and present realities of the Indigenous peoples of Canada, and that recognize Indigenous ways of knowing and validity as acceptable methodologies).
- Indigenize campuses—with a focus on acceptance, inclusion, and respect.
- Enhance Indigenous education leadership through targets for faculty hiring and undergraduate and graduate enrolment.

- Create and foster spaces for intercultural exchange, enhancing supports to Indigenous students to ensure their success:
  - Maskwa House of Learning
  - Facilitating drawing on the expertise of Elders and Knowledge Holders
  - Increase the numbers of Indigenous people in the professoriate
  - Expand existing First Nations language programs such as CILLDI in the Faculty of Arts
- Create and support transition support programs:
  - Reconcile differences in secondary education on reserves versus off reserves.
  - Support non-traditional learners in achieving secondary leaving certificates as well as creating post-secondary learning opportunities.
  - Create programming that embraces non-traditional learners who are perhaps coming to post-secondary education later in life, who are dealing with challenging family circumstances, or who are themselves bridges to education in their communities—taking back their experiences and supporting other learners to participate.

### **French-Language Learners**

The U of A also boasts the only Francophone faculty in Western Canada: Campus Saint-Jean (CSJ). With increased diversity of the student population, CSJ is poised to support francophone students, professoriate level scholarship, and language diversity, particularly as an emphasis on international recruitment increases. The Francophone community in Alberta is very strong, and there is a need to serve unilingual members of that community as well as to support a national commitment to language diversity.

### **Community Engagement**

The U of A has a particular responsibility and strong commitment to engaging with and supporting communities, both near and far, across the province and around the world. Aside from the deep and ongoing interactions with communities that take place as part of the institution's far-reaching academic and research endeavours, the University of Alberta has specific plans to develop programs (such as post-graduate professional certifications and distance certificates) and spaces (such as the Galleria and the Twin Arenas) to further engage with communities from a capacity-building standpoint (enhanced professional credentials), as well as from an enrichment and engagement standpoint (music, art and design, and sports).

Developing engaging and inviting programs, general and targeted toward specific groups and audiences, as well as developing buildings and spaces that are welcoming to the broader community, will facilitate the fostering of stronger community-university relationships. The university currently has a wide variety of programming, awards and initiatives that actively engage the public to serve specific needs and to shape the institution's outreach. The focus on community engagement has only strengthened over recent years with the institution expressly articulating goals and plans meant to guide and further this effort.

Some examples of ongoing community engagement include the following:

- The Community Connections Awards (Community Scholar Award, Community Leader Award, UAlberta Advocate Award) recognize individuals or teams of community members, faculty, staff, students, or post-doctoral fellows who embody the spirit of the U of A's promise, "Uplifting the Whole People." The awards honour the positive impact of nominees on communities near and far, as well as their impact on the university. Award winners may be distinguished through such community service activities as public speaking, volunteer work, school visits, or other

substantial community service work. These awards are presented and celebrated annually by University Relations. Award recipients have included:

- Community Scholar Award - Candace Nykiforuk: Candace Nykiforuk is committed to community-engaged scholarship in public health and builds and nurtures strong collaborations with local, provincial, and national partners, making key contributions to the health of our communities. Her “Community Health and the Built Environment” suite of projects explores how changing the built environment influences healthy decisions. From walking paths with benches for seniors to rest on in Bonnyville, to no-fee summer programming for children in St. Paul, Candace’s work shows how small changes can have a tremendous impact on our health. Candace is a co-founder and current co-lead for the Alberta Policy Coalition for Chronic Disease Prevention, a group of 17 organizations that work together to advocate for healthy policy changes in Alberta.
  - UAlberta Advocate Award - Ms. Renée Vaugeois is a University of Alberta political science graduate and serves as executive director of the John Humphrey Centre for Peace and Human Rights. She has helped launch a number of human rights initiatives at the community level, including the U of A’s Peace and Post Conflict Studies Certificate program. As well, through her work with the United Nations, Development Program, Edmonton was the first community in North America whose citizens pledged to promote Edmonton as a human rights city. Vaugeois has spearheaded projects such as the Ainembabazi Children’s Project, the Ignite Change Now! Global Youth Assembly, and “Get Out and Stay Out” a two-day event held in conjunction with the Kule Institute for Advanced Study, connecting the U of A and its students with the global community.
- To advance rural community engagement, in 2013 the U of A began the Advancing Alberta Initiative, an outreach campaign targeted towards rural Alberta and intended to demonstrate the relevance, value and impact of post-secondary education and the university on the quality of life and economic well-being of rural communities while soliciting direct feedback from the community. To date, the tours have seen senior administration meet with members of the public, elected and unelected officials and community and business leaders representing a variety of stakeholder groups in their own communities. The tours have offered a means by which these areas can communicate their key priorities to the university in order to seek practical, local solutions to local challenges.
  - In 2015, the University of Alberta created the Speakers’ Bureau, a web portal which aims to connect the wider public with some of the many public intellectuals, policy advisers and thought leaders among the U of A’s scholars and researchers. The Speakers’ Bureau strives to connect these academic resources with community audiences with a desire to learn about research and initiatives, and their impact and relevance to everyday life. Communities have direct access to U of A experts on a wide variety of topical subjects.
  - The university engages community leaders in events for the campus community and the public on a regular and ongoing basis. Recent examples include:
    - the 10th Annual Hurtig Lecture on Cities and the Future of Canada, held Oct. 21, 2015. Mayors Don Iveson and Naheed Nenshi spoke on the future of Canadian cities.
    - the 2nd Annual Olivieri Lectureship on Medical Ethics, held Jan. 8, 2015. Professor Timothy Caulfield of the Faculty of Law and School of Public Health presented: “When Celebrity Culture and Science Clash: The Distortion of Independent Research.” The lectureship is sponsored by the Harry Crowe Foundation with the support of AASUA and the U of A.

- the J. G. O'Donoghue Memorial Lecture. Jason Clay, senior vice-president of the World Wildlife Fund, delivered a lecture entitled, "Saving Biodiversity by Promoting More Sustainable Food Production" for the ALES Centennial Lecture Series.
- the Fifth Annual Student Sustainability Summit, hosted from Jan. 24–26, 2015, at the U of A. This conference strives to provide students with the tools and resources needed to accomplish sustainable change by providing opportunities to develop relevant leadership and employability skills.
- University researchers and administrators serve the community by working closely with government and stakeholder groups to contribute to societal issues and policy outcomes:
  - Joseph Doucet, Jeffrey Bisanz, and Louis Francescutti have all served on various committees including the task force for EndPoverty Edmonton, a strategy launched in September 2015 to end poverty in Edmonton in a generation.
  - Education Minister David Eggen has announced new guidelines for educators to support and protect LGBTQ students. Kris Wells of the U of A's Institute for Sexual Minority Studies and Services helped develop the guidelines.
  - Tracy Bear has been involved with Status of Women ministry consultations, as well as the Walking With Our Sisters project.
  - Native studies/arts professor Tanya Harnett is working on a project with the Royal Alberta Museum involving Indigenous exhibit design.
  - Frank Tough of the Faculty of Native Studies has presented to bodies such as the Senate Committee on Aboriginal Peoples on the question of the legal and political recognition of Métis identity.
  - Karen Pheasant, a PhD candidate in the Faculty of Education, works with Edmonton Public School Board "West 6" schools as a cultural consultant. These are schools with a high Indigenous population.
  - Premier Rachel Notley named Joseph Doucet, dean of the U of A's Alberta School of Business, as chair of the Premier's Advisory Committee on the Economy. Premier Rachel Notley named energy economist Andrew Leach chair of the Alberta Climate Change Advisory Panel to lead a comprehensive, consultative review of the provincial climate change policy.

Another important part of community engagement includes the internal function of all aspects of good governance so as to ensure transparency, formalized decision-making, appropriate control and most importantly, accountability to the people the institution serves. The University of Alberta remains deeply committed to good governance practices and this is a central consideration of the institutional strategic planning process currently underway.

### **Alumni Events and Volunteerism**

To build connections with students and engage 267,000 living U of A graduates (75 per cent of which live in Alberta and 50 per cent in Edmonton), the Office of Alumni Relations orchestrates student outreach, alumni special events, educational programs featuring U of A research, and volunteer opportunities. In 2014–2015:

- Alumni engagement programs connected with 46,420 participants (17,278 students and 29,142 alumni and friends).
- Regional alumni chapter programs engaged 3,896 participants in Alberta communities and in key regional markets such as Toronto, Vancouver, Victoria, Hong Kong, and the Bay Area in California.
- More than 1,000 alumni volunteers were involved in supporting community and university-based projects.

- In the last five years, outreach has increased by 125 per cent through events and programs.

**Co-op Education**

In the last three academic years, 3,666 undergraduate students (approximately 7.3 per cent of undergraduates) at the U of A have participated in for-credit co-operative education and internship programs. Students from the faculties of ALES, arts, business, engineering, and science have spent time working in industries, NGOs, and governmental organizations related to their fields of study. In the faculties of business and engineering, 20 per cent and 33 per cent of students (respectively) participated in co-operative education.

# Appendix E: Internationalization

The University of Alberta's international collaborations create exceptional learning, discovery, citizenship, and innovation opportunities to advance the institutional vision of being one of the world's top publicly funded institutions for the benefit of our students and the province.

## Global Engagement

U of A programs enhance perspectives on challenging global issues and promote cross-cultural understanding and communication skills. These experiences equip students with the necessary knowledge and skills to be successful in an increasingly global environment. Some of our student-centred initiatives, which promote global engagement, include:

- increased experiential, internship, and co-op experiences in international settings. Examples include the e3 program in Berlin, Brazil, and Washington, as well as other educational and research abroad programs in more than 60 countries.
- increased opportunities for U of A students to participate in shorter-duration international experiences, either as an integral component of academic courses or independently. Examples include the Alternative Reading Week program in the Faculty of ALES.

## Research

The U of Alberta is a research-intensive institution with research output that is recognized globally in diverse disciplines. Through active, collaborative research with teams from all over the world, professors advance knowledge, education, and pedagogy in their respective disciplines. Global research engagement has many benefits to the U of A and the province, including leveraging funding resources from other parts of the globe to address challenges that affect everyone, including Albertans. It also allows for the exchange of researchers at various stages in their career (e.g., professors, post-doctoral fellows, graduate students, and undergraduate students) to spend time at the U of A and allows our own researchers to travel to collaborating institutions. The U of A will continue to engage in high-quality, multidisciplinary, multinational research projects in many parts of the globe, including:

- continuing efforts to establish new partnerships in strategic areas
- strengthening existing strategic international partnerships with India, China, Germany, the United States, and Brazil
- fostering new, multi-disciplinary, multi-national research projects in diverse disciplines with partner institutions from other countries
- Leveraging international funding agencies (e.g., the Gates Foundation) to secure resources to tackle emerging problems in regions of interest. The U of A has the critical mass of excellent researchers in many disciplines to achieve this objective.

Investment in post-secondary to pursue international research partnerships is a cost-effective pathway to attracting external revenue streams.

## Diversity

The presence of international students and foreign-trained experts broadens the perspective, impact, and relevance of the U of A's teaching, research, creative activities, and community service work. International students who are educated at the U of A and remain in Alberta provide the province with additional highly skilled, innovative, and entrepreneurial professionals. They also bring cultural diversity together with global connections, insights, and alternative perspectives on issues and challenges that better position the university, businesses, and the province. Their contributions to the province advance the profile of Alberta, its expertise, and its opportunities on the global scale. The

recruitment of exceptional undergraduate and graduate students from targeted highly ranked foreign institutions advances the university's academic enterprise and objectives. In 2014–2015, approximately 14 per cent of our undergraduate population and 35 per cent of our graduate population were international students. However, the U of A is currently reliant on a relatively small number of sources for international students. To continue to increase diversity, the university will:

- diversify the international student body by establishing partnerships with highly reputed institutions in target countries
- explore opportunities for creating joint degree programs at the undergraduate and graduate levels, where possible, with highly ranked institutions outside of Canada
- provide incentives to attract excellent students from targeted institutions

# Appendix F: Capital Plan

Post-secondary education in the 21st century is highly competitive. The vitality, vibrancy, and sustainability of the University of Alberta's multi-campus educational and research ecosystem can only be maintained through well-supported, well-planned strategic repurposing and renewal of its existing facilities and the construction of new ones. As the university changes, space must transform to meet new needs and requirements.

Underpinning all University of Alberta strategic capital and planning priorities is a commitment to overarching principles and values:

## **Accessibility**

- The U of A's Capital Plan is developed to support the aforementioned aspirations through thoughtful, culturally sensitive public spaces as well as supportive student communities that afford a transformative student experience. The U of A is committed to developing and delivering programs that are accessible for all learners, be they from Alberta, elsewhere in Canada, or abroad.

## **Affordability**

- By coupling renewal and backfill projects, the U of A provides a best-value model for creating projects that look forward to our future operational and academic needs at a reduced capital cost. However, strategic investment in infrastructure and buildings remains vital in maintaining the delivery of superior academic programs.

## **Quality**

- High-quality academic programs require well-maintained and thoughtfully repurposed spaces that facilitate program delivery. The university has the opportunity to sustainably maintain and, where appropriate, repurpose aging assets and infrastructure as new funding is made available.

## **Partnering**

- Pursue partnering opportunities with third parties to leverage funding and ensure optimum utilization.



# Long Range Planning, Key Focus Areas, and Capital Planning Considerations

## Long Range Planning

### BACKGROUND

As in previous years, the following Capital Plan endeavours to take a balanced approach in identifying the University of Alberta's planning, engineering, and construction needs. As we look forward, long-term (25-year outlook) strategic planning will guide five-year capital plans and will be based on key requirements of a research-intensive university with five separate and distinct campuses while considering the age of infrastructure, asset inventory, and the provincial economy.

### KEY ISSUES

- The U of A is required to maintain some of the oldest publicly funded infrastructure in the province.
- The U of A is a research-intensive institution and requires facilities that support current and future research activities.
- Without long range planning, publicly funded post-secondary institutions will continue to struggle as the governments that fund them find their budgets stretched.

### MONITORING AND LONG-TERM PLANNING ACTIVITIES

- Identify risks over time to prime infrastructure required to support research, teaching, learning, and evolving student requirements, including the requirements of historically under-represented groups.
- Identify opportunities for the development of supportive student housing that offers programs aligned with key university priorities.
- Assemble required resources including government funding, monetization of assets, partnerships, leverage, P3s, borrowing, etc., to achieve high-priority goals.
- Communicate to all stakeholders the physical infrastructure requirements of a top-tier university.

### INITIATIVES

- Update Long Range Development Plans as required.
- Develop business cases that, among other things, articulate strategic alignment of capital projects.
- Ensure planning for utility capacity is updated and current for all campuses.
- Produce and routinely update 10-year preservation and deferred maintenance strategic plans.
- Develop implementation strategies for the first five-year plan (2015–2020) arising from *A Strategy for Student Housing: 2015–2040*.

### INSTITUTIONAL GOALS

The university's highest project priorities have been identified as requiring additional funding support from the Alberta government (see tables 7, 8, 9, and 10). These projects support and are strategically linked to Comprehensive Institutional Plan goals and their associated initiatives:

- Faculty Renewal
- Student Experience
- Teaching and Learning
- Research Excellence
- Community Engagement

### **CAPITAL NEED PRIORITIES SUPPORTING INSTITUTIONAL GOALS**

Critical projects, as identified to the Government of Alberta in the *Capital Needs Briefing (August 4, 2015)*, are further refined to the following groups:

- New (or replacement) projects (See table 7)
- Expansion projects (see table 8)
- Preservation projects (> \$5 million) (See tables 9 and 10)
- Minor preservation projects (< \$5 million) (See tables 9 and 10)
- IT deferred maintenance
- Health and Safety
- Building system renewals

### **OUR FOUR AREAS OF FOCUS:**

- 1. Functional renewal and reduction in deferred maintenance liability:** Preserve existing physical assets by addressing deferred maintenance and functional renewal that acknowledges the changes in research and teaching requirements. This will be done in a manner that increases energy efficiency and, where possible, adds assets to the institutional renewable energy inventory. This program will play a critical role in meeting space utilization requirements, attracting staff and students, supporting the pedagogical needs of tomorrow's learners, and reducing the energy footprint of the university.
- 2. Envelope funding for pre-design services:** Target planning dollars for priority projects, thereby ensuring well-defined project scope and budget accuracy.
- 3. Student housing:** Provide purpose-built, supportive student housing for up to 25 per cent of full-time enrolment to keep pace with U15 peers, enhance completion rates, and ensure accessibility for rural and under-represented Albertan students as well as international students.
- 4. New space:** Strategically plan and construct critical new facilities, respecting the varied needs of the university's five distinct campuses as they each serve unique and separate constituencies.

Due to continuous review of budgets and scopes, project cost estimates are updated regularly. Estimates have been adjusted to align with current market conditions and take into account the university's and government's experience of the current construction costs and projected market escalation.

### **FOCUS AREA 1: FUNCTIONAL RENEWAL AND REDUCTION IN DEFERRED MAINTENANCE LIABILITY**

#### **BACKGROUND AND CURRENT STATUS**

Recent investment in new facilities has created an opportunity to creatively address physical and functional renewal of our buildings. Many older facilities were not designed to accommodate the functional and operational requirements of current and future faculty and students (Faculty Renewal and Student Experience). Combining functional and physical renewal projects through backfill projects

provides a best-value model for capital projects, minimizing the need for new buildings while facilitating the needs of tomorrow's learners and researchers, all at a significantly reduced capital cost.

To capitalize on these opportunities, adequate Infrastructure Maintenance Program (IMP) funding is critical. Where possible, this funding continues to be leveraged in partnership with other internal and external funders. The university's deferred maintenance liability cannot be significantly reduced unless an increase in annual grant funding or one-time funding is received.

Institutional deferred maintenance liability identifies condition-related deficiencies recommended for remediation within five years under a series of events that are established by the provincial government. The estimated total (as of March 31, 2015) recognized deferred maintenance on supported and unsupported university facilities is \$749.2 million for supported facilities and \$116.1 million for unsupported (ancillary) facilities. In supported facilities, 88.5 per cent of the deferred maintenance occurs in facilities over 40 years of age. Similarly, in unsupported facilities, 89 per cent of the deferred maintenance liability occurs in facilities more than 40 years old. Historically, government has acknowledged a one-year deferred maintenance value. The university supports moving to a longer term view (five and ten years) providing a more strategic overview of the liability and facilitating alignment with investments in research and teaching technologies.

Of the \$749.2 million in recognized deferred maintenance for supported facilities, 53 per cent is associated with science lab facilities and 32 per cent with office and classroom facilities. These facilities are critical to program delivery and research for the U of A.

There are more deferred maintenance costs than reported, because many costly building upgrades dealing with changes in code, hazardous material removal, functional renewal, barrier-free access, indoor air quality, and various energy and operational efficiencies are not currently recognized by government in the deferred maintenance tracking tool.

The university manages a portfolio of facilities totalling 1.8 million gross square metres over more than 500 buildings, of which 50 per cent are more than 40 years old and 80 per cent are more than 20 years old. As part of reporting to government, we also report on our buildings' Facility Condition Index (FCI). Approximately 17 of our buildings have an FCI over 30, with Dentistry/Pharmacy being the highest at 66, with a higher score indicating worse condition.

With aging facilities, major system failures or life safety items arise on an emergency basis and must be addressed. Due to a number of major failures over the past three to four years, the university has advised government that adjustments may be required to the three-year rolling IMP plan. A recent example is the 2015 notification of serious concerns of failure with an electrical vault serving Chemistry West. Failure of this vault will result in the loss of the facility for teaching and research. The university continues to proactively monitor and coordinate with government on growing pressures in order to maintain access and minimize the risk of being required to shut down teaching, learning, and research space.

Without supplementary, one-time grants for large, high-priority projects, renewals such as Cameron Library and Butterdome exterior skin replacements or the renewal of the Medical Sciences and Clinical Sciences buildings will have to be deferred to future years. Fifty-four per cent of deferred maintenance occurs in facilities that are mission-critical to program delivery and research for the U of A. This is a significant number that will at some point have an impact on program delivery. Focus on reduction of deferred maintenance for science lab and classroom facilities needs to be a priority to support program delivery and faculty renewal.

Tables 9 and 10 itemize the U of A's highest priorities for "Preservation" and "Renewal".

## **OBJECTIVES**

- Maximize opportunities to identify and proactively address deferred maintenance and functional renewal through joint renewal and repurposing projects for existing building inventory that would also look at energy reductions and the move to renewable energy on an opportunity basis.
- Ensure stable, long-term funding for deferred maintenance, and work with government to develop funding strategies that could support increased funding on the order of \$25 million to \$35 million annually.
- Support the academic and research goals of the institution and maximize use and life of existing infrastructure, by ensuring that space is functional for current and future learning and research.
- Continue to maintain the condition and functionality of the university's physical assets, which plays a critical role in our ability to attract, support, and retain the best students, faculty, and staff.
- Reduce the risk of building system failures that could affect life safety or result in building closures.
- Maintain the reliability of the university's utility plant through focused investment in the functional renewal that deals with both deferred maintenance and increased efficiency with new technology.

## **INITIATIVES FOR RENEWAL AND MAINTENANCE**

- Three-year Infrastructure Maintenance Program expenditure plans: This initiative was adopted by the university in 2004 and was formalized with a request by government for an initial submission in 2008. The rolling three-year plan has been part of the university's annual reporting to government and is carried as a financial update in our quarterly reports to provide timely progress reports on the use of grants.
- Benchmarking With other Canadian universities: This initiative began in 2005 and was updated in 2010–2011 and again in 2014–2015. For the next update, the university will be working through Sightlines on a benchmarking initiative for deferred maintenance to North American peer research institutions.
- Heating plant expansion and renewal/electrical utility system expansion: The university will seek government funding to ensure the continued supply of reliable services to our campus and surrounding government buildings served by our central plant. The possibility of leveraging this investment with additional institutional borrowing to install a new co-generation unit that could produce both steam and power simultaneously will also be examined. This project would reduce the campus's overall carbon footprint, reduce our demand on the Alberta grid system, and increase our capacity to produce reliable power. In addition to this, the North Campus electrical utility system requires an expansion to incorporate the addition of future large buildings (i.e., Translational Lab, Walter C. Mackenzie hospital expansion, Cross Cancer Institute expansion).
- South Campus infrastructure: New infrastructure to support the development of the northeast sector of South Campus include deep sewer, water supply, road lighting, and specific improvements to support the siting of community complexes on campus.

## EMERGING ISSUES AND STRATEGIES

- Sustainability: Through recommissioning and sequenced renewal of targeted buildings that are functional and structurally sound, the university can reduce the carbon footprint and specific energy requirements of older assets. The potential social, environmental, and economic benefits can be dramatic.
- Optimizing use of energy and space: Operational initiatives that are under-way at the University of Alberta that are significant in terms of addressing reduction of greenhouse gas emissions, energy utilization in research facilities, and improvement of space utilization include:
  - optimization of air flows for research labs to reduce exhaust and supply air deliveries. Typically an average fume hood uses three to four times the energy of an average home. With the number of high-intensity research and teaching facilities on campus, addressing fume hood energy consumption is a significant opportunity. New technology from Aircuity is in the process of being deployed in all active teaching and research facilities that have fume hoods. The initial launch of the program is \$4 million with an anticipated payback of approximately five years through utility savings (note I can get the GHG estimated reduction if required as well).
  - an on-going program for the installation of people counters for classroom spaces. This program provides three levels of benefits. First, the people counter data are used for feedback on ventilation control to supply only the quantity of air equal to the occupant load for energy savings. The second benefit is that tracking the use data allows for maximum space utilization of our facilities and allows for re-deployment of cleaning staff to other functions. The third benefit is that a full data set for utilization of classroom spaces, once compiled, will allow for a determination on shutting down of spaces for summer months, re-programming of spaces or targeted renewals to allow for increased utilization.
- Increased liability: Current and previous IMP funding levels alone do not provide adequate funds to address current and trending levels of deferred maintenance.
- Operational continuity: An inability to maintain the operations, functionality, and utilization of capital assets places the institution at risk of negatively affecting current and future research, teaching, and learning.
- Reduce capital requirements: Renewal and repurposing of target buildings that are functional and structurally sound results in lower overall capital costs compared with the cost of a new building on a green field site.
- Space utilization: The university is reviewing space use to determine how underused space could provide cost-effective swing space during renewal or repurposing projects, and is also exploring opportunities for consolidation, repurposing, and enhancing support of teaching and research.
- Renewal and repurposing: Adequate funding for repurposing space in key older buildings is still a challenge. Deferred maintenance is an ongoing issue, but when renewal projects are coupled with modernization projects, the entire functionality of the building is upgraded to meet the needs of today's learners, teachers, and researchers.

## **FOCUS AREA 2: ENVELOPE FUNDING FOR PRE-DESIGN SERVICES**

### **BACKGROUND AND CURRENT STATUS**

Prior to entering design phases for a capital project, certain services, beyond the capacity of the institution's staff, must be procured to clarify needs such as general and functional space programming, outlining scope and size, identifying solution alternatives, selecting the preferred solution, and determining a relatively firm cost. When dealing with existing facilities, it is imperative to understand the facility's constraints within which the project team must work.

In addition, services of external professionals are often required to assist with significant initiatives, such as studies and master plans to clearly define objectives, future use, and adjacency issues. Past project experience has reinforced the value of preliminary engineering efforts, resulting in projects being delivered on time and on budget.

The traditional funding model sees projects initiated once full funding is secured. Projects generally take three to five years to deliver, depending on scale and complexity. Recently, the university has had significant success using partnerships to deliver its capital priorities, resulting in reduced capital requirements compared with the more traditional approach. To effectively develop and explore partnership opportunities, significant up-front work is required to properly scope, budget, and vet potential projects. The university is seeking pre-design funding to create an inventory of projects ready to move forward as new capital funding and partnership opportunities become available.

Pre-design services must provide a clear tie between campus development and the immediate and long-term strategic vision of the institution. The university understands that approval of pre-design does not constitute approval for, or promise of, future capital funding for a specific project. However, by being ready as funding becomes available, the university can potentially save millions of dollars in inflationary costs that might be incurred if construction is delayed.

There are a number of cases in which pre-design has aided the university to actively engage and leverage partnership funding opportunities. For example, taking a staged approach with the Li Ka Shing Centre for Health Research Innovation and the Katz Group Centre for Pharmacy and Health Research buildings allowed for a proactive and quick response to the demands of the federal KIP program. Currently, the Devonian Education and Learning Centre (schematic design), the Maskwa House of Learning (schematic design) and Dentistry/Pharmacy building redevelopment (design development to core and shell) have all benefited from pre-design, resulting in a refined budgeting process in establishing capital requirements.

### **OBJECTIVES**

- In the short term, seek funding for pre-design services related to strategic priorities and major opportunities, or mandate both, to provide greater scope and budget certainty and to enable responses to new funding in a timely manner. As greater levels of funding become available, seek a long-term funding envelope program that would include government contributions through capital grants as well as partnered contributions from internal sources where possible.
- Provide strong and clear campus planning documents that are rooted in leading urban design and sustainability principles. The plans will seek to provide necessary direction, ensuring academic program needs of the university are met, with careful consideration to the expressed interests of the surrounding neighbourhoods.
- Reduce the university's reliance on expensive, long-term commercial leasing with better pre-design planning that anticipates the university's quickly increasing space needs.

## **INITIATIVES FOR ENVELOPE FUNDING AND PRE-DESIGN**

**Funding for Pre-design Services:** Recently, a letter was submitted to government outlining the importance of pre-design funding in the current economy. The letter outlined two potential approaches to pre-design funds. The first was a list of projects and estimated design costs per project, with funds proposed to be disbursed over three fiscal years. The second approach was to work with government to establish an annual funding allowance, which suggested an annual planning envelope in the range of \$2 million to \$3 million.

**Project Readiness and Responsiveness:** Within this framework, projects yet to be approved would be partially advanced prior to project approval. Taking this action provides significant benefits: better-defined project scopes and budgets provide a higher level of program and cost certainty. It also facilitates a quantitative and qualitative approach in matching the project with the most appropriate delivery model, whether a traditional design bid build or a more entrepreneurial P3 approach. Lastly, it positions the institution and government to respond quickly to the ever-changing construction marketplace and new potential funding programs.

## **EMERGING ISSUES**

- **Backfill planning and repurposing:** With the completion of a number of new buildings, there is an opportunity to leverage renewal with redevelopment. Given the goals and aspirations outlined in the CIP and the existing deferred maintenance associated with these buildings, a number of factors require consideration in assessing the residual capacity resulting from new construction. Up-front planning will enable the university to create a renewal and repurposing plan to ensure today's assets can deliver tomorrow's programs, as identified in the respective general space programs for the various faculties and administrative units, in the most sustainable way.
- **Increased research intensity:** As a research-intensive institution, the U of A is faced with a growing need to convert administrative and undergraduate space to accommodate growth in graduate, doctoral, and post-doctoral programs. These research programs require significantly more physical space and infrastructure than the university's aging inventory can accommodate. Advance planning is essential to determine how to best renew and repurpose these areas to maximize utilization without significantly and negatively affecting undergraduate space.
- **Increasing area of aging infrastructure:** Although new construction has accommodated the planned growth of the institution, the university must continue to respond to its learning goals. There are a number of targeted buildings for which planning work must be completed:
  - the Medical Sciences Building
  - the Clinical Sciences Building
  - the Augustana Science Building
  - the South Academic Building (formerly Civil\Electrical Engineering Building)
  - the Mechanical Engineering Building
- **Advanced pre-design funding for condition concept studies and reports** would provide the opportunity to responsibly accommodate future growth, while aligning with the expectations of government.
- **Campus planning and community expectations:** The university continually engages its neighbours and stakeholders in the planning and design of its campuses as they develop. Communities increasingly demand that the university's planning documents be detailed

enough that they are fully aware of the impacts of development. Critical to meeting these expectations is our ability to continue to work alongside these communities and ensure that the consultation process is maintained through the development of sector plans, as well as project-specific siting, pre-design, and preliminary design efforts.

- The Long Range Development Plan (LRDP) needs to be updated to reflect new lands acquired, such as:
  - Enterprise Square
  - St. Albert Research Station
  - Devonian Botanic Garden
  - Augustana Land Bank
  - Kinsella Ranch
  - Mattheis Ranch

Given the recent amendments to our North and South campuses, the university will be working to repackage its LRDP document so that each of our five geographically distinct campuses will have individual plans that properly reflect the unique and varied programming and community considerations associated with these campuses.

### **FOCUS AREA 3: STUDENT HOUSING**

#### **BACKGROUND**

The U of A continues to respond to pressures for additional student residences. Research indicates that the quality of housing facilities and academic programs correlate with academic performance and the success of students. These facilities are also a component of the university's ability to attract and retain students, faculty, and staff. The university aims to provide purpose-built housing for up to 25 per cent of full-time students, which is in line with peer institutions.

To fulfil the objectives of the university's *White Paper on Student Housing*, the Academic Plan, and the priorities of the Government of Alberta, the university plans to increase on-campus, purpose-built, supportive, and accessible housing, to answer an increasing need to integrate support programs and academic learning space into student housing. This will meet the needs of targeted groups such as graduate, rural, Indigenous, and international students. Faculty, staff, and mature students with families are also increasingly seeking housing options at the university, and must be included in current planning.

#### **OBJECTIVES**

- Use the findings and recommendations contained in the U of A's strategic planning document *A Strategy for Student Housing, 2015–2040* (June 2015), to provide the context of further discussion and planning concerning housing on campus.
- Continue working with the Ministry of Advanced Education, other ministries, and stakeholders to develop creative housing solutions that are sustainable and meet the goals of the university, students, and their families.
- Emphasize the importance of funding for residential program space that supports the academic mission and student success.

#### **INITIATIVES FOR STUDENT HOUSING**

- *A Strategy for Student Housing, 2015–2040*: This study presents a road map with respect to how residences might develop in the future, including the types of programs and activities that should occur in support of the development of the whole person. The university will be using



this document as a guide in planning and developing additional space to provide opportunities and access to rural, Indigenous, under-represented, and international students, as well as students with families.

#### Phase 1

- Lister Hall Tower #5: 520 bed spaces for first-year students
  - East Campus Village 9: 300 bed spaces for upper-year students
  - Augustana Campus: The university will continue to enhance student experiences at Augustana by planning new student residences and developing modernization plans for current communities.
- Condition and functionality: The university does not receive targeted deferred maintenance funding for student residences. Student residences have high infrastructure needs, compounded by the university's inability to recover the current backlog costs of maintenance or modernization via rental revenues. In 2010–2011, the university began reviewing strategies that would help build a reserve fund for maintenance and renewal of student residences (Residence Services Capital Reserve Strategy, June 2010), and our newest student housing complexes have building reserves integrated into the rental rates. Changing student demographics and requirements, as well as improved understanding of program delivery, are driving the need for modernization in several of our older student residence communities. The university will continue to work with government to identify one-time and continuing deferred maintenance funding for student housing to prevent closure of much-needed residence spaces.
  - Partners: The university will continue to meet with private-sector developers to explore viable options to achieve our residence and housing targets.
  - Property taxes: The university will continue to discuss means of eliminating municipal property tax assessments on student housing, thereby directing more funds to critical deferred maintenance.
  - Lights-on funding for academic program areas within residences: In some student housing communities, especially in first- and second-year residences, as much as 20 to 35 per cent of the gross area is being used to provide space that accommodates co-curricular programming, study halls, and other student support services. If these spaces did not exist in residences, there would be pressure to provide these spaces elsewhere on campus. The university will continue to work with government to find ways to acknowledge these aspects of student development and discuss ways to bring lights-on funding to academic program areas in residence spaces.
  - Capacity: The university is exploring strategies to add student residence capacity on its campuses, as well as to provide workforce housing options on the West 240 lands on South Campus and Michener Park.
  - Michener Park redevelopment: Available and supportive family housing is essential for recruiting and retaining graduate students and post-doctoral fellows. Ancillary Services has undertaken community and business planning with a view to advancing this important project. The first phase of this project will result in an approximate doubling of our current married-student housing units and the creation of a community that can seamlessly integrate with the surrounding communities. This project will also serve to eliminate the existing deferred maintenance liability at the Michener Park site.

## **FOCUS AREA 4: NEW SPACE**

### **BACKGROUND**

Between the 2011 opening of the Edmonton Clinic Health Academy and the opening of the Donadeo Innovation Centre for Engineering, the university, with the support of government, has added approximately 150,000 square metres of new and expanded space, most of which has already been accounted for in approved program expansions. As the university continues to take a measured response to growth, there is still a need for strategic construction of critical new facilities. It is also important to recognize that the needs of the U of A's five campuses vary, each serving unique and separate constituencies within Alberta.

The university has identified a number of new expansion projects critical to its mission, vision, reputation, and global competitiveness. Some of the highest-priority projects include:

- an integrated innovation centre housing provincial testing labs, private diagnostics facilities, and translational labs for the university
- Research and Collection Resource Facility (RCRF) formerly known as the Book and Records Depository (BARD)
- a new School of Music and Art & Design facility within the Faculty of Arts
- Maskwa House of Learning
- the backfill requirements for the Engineering precinct
- a new Twin Arenas with extended Faculty of Physical Education and Recreation programming functions and community use
- a metabolic unit replacement on South Campus
- a building expansion to accommodate science programs on Augustana Campus and Campus Saint-Jean
- a new Alberta School of Business building to accommodate growth within the faculty

Tables 7 and 8 itemize the University's highest priorities for "New Capital" and "Expansion".

### **OBJECTIVES**

- Outline the capital needs of the institution in order to deliver the vision and programs included within this Comprehensive Institutional Plan. Space must not only provide simple access, but also ensure that the entire educational and life experience of students is supported.
- Confirm the state of the current inventory of academic support facilities. Identify adequacy, appropriateness, and availability of the facilities and engage government in discussions to outline the importance of these facilities and remediate identified shortfalls in these integrated program areas.

### **INITIATIVES FOR NEW SPACE**

- Priority setting: Continue to work with government to align priorities for new capital and partnerships.
- Strategic advance planning: Continue to work on advance planning of high-priority projects so they are in a state of readiness once new capital funding becomes available.
- Partnerships: Continue to explore partnerships through donations, and alternate financing and project delivery models, to leverage any available funding and reduce initial capital investment and increase community use

## EMERGING ISSUES

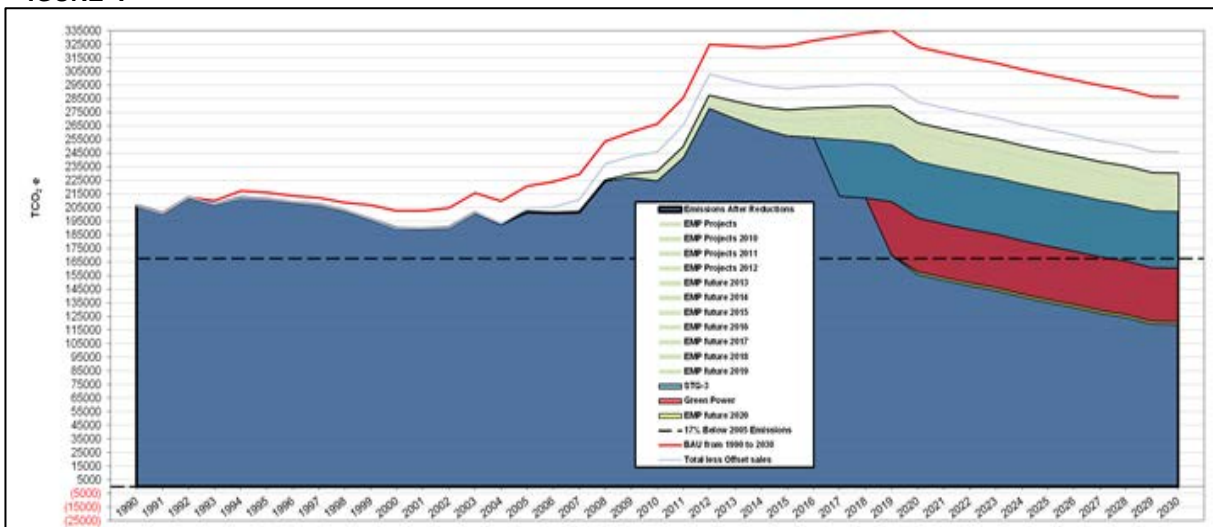
- Provincial and global economies: Currently the key issue affecting new space and corresponding capital is continued economic uncertainty and volatility. The university needs to continue to work with government to develop strategies that maximize and leverage limited government resources.
- Lack of adequate academic support space: Over the past 10 years, there has been a concentrated focus on funding projects that lead directly to much-needed increases in access. This has now put a strain on our academic support spaces, which have not grown proportionally with increases in enrolment.

# Highlights of 2015–2016

## INITIATIVES

- Energy Management Program: Given the success of the University of Alberta's energy management program (EMP), the university initiated a new round of energy projects for campus facilities. As in previous years, the next generation of the EMP is financed through borrowing and paid back through resulting energy savings. The accumulated impact of our ongoing and significant investment in energy initiatives has aided in reducing greenhouse gas emissions and lowering operating costs, adding renewable energy to plant capacity and has contributed significantly in a partnership approach to the reduction of deferred maintenance liability.

FIGURE 4



- Sustainability: Under the leadership of the Office of Sustainability, the U of A's commitment to sustainability is articulated in the Sustainability Commitment and Guiding Principles (endorsed by the Board of Governors in 2008) and the institutional Sustainability Plan 2016–2020 (currently in its second draft with finalization pending in 2016). The university measures, tracks, and reports on performance using the Sustainability Tracking, Assessment & Rating System (STARS™). The university achieved a Gold rating in 2014 (up from a Silver rating in 2012) by

increasing efforts across four categories: academics, engagement, operations, and planning and administration.

- **Utilities:** The U of A's District Energy Plan has three primary focuses going forward. The first is replacing aging 50-plus-year-old electrical infrastructure in the heating plant while simultaneously providing a reliable supply of steam and power to the greater campus area. This was started in 2014 and will be a seven- to 10-year project. This project is entirely funded through utilities reserves, which reflect our market activities. The second focus is on ensuring reliability of steam supply. Fifty per cent of our steam supply capacity is more than 45 years old. In an innovative and financially viable approach, the university is proposing to produce power for more reliability and at lower prices, and steam to replace aging boiler capacity by installing a gas fired co-gen turbine (TG3). We are seeking approximately 50 per cent of the project funding (\$40 million) from government to support the university and other public sector stakeholders, with the balance funded from reserves. The final focus is the future expansion of the electrical utility system to facilitate the connection of new facilities (e.g., Translational Lab) to the U of A's District Energy System.
- **Student housing:** The university presented to the Board of Governors *A Strategy for Student Housing, 2015–2040*. Embedded in the strategy are two five-year implementation plans. The first plan is being implemented and will deliver up to 820 new bed spaces on the Edmonton campus in 2018, as well as potential residence development at Augustana.

**Formation of the University of Alberta Property Trust Inc.:** This wholly-owned subsidiary of the University of Alberta acts as trustee to manage and develop university-owned lands and to raise dedicated, permanent funding to support the core mission of the university. The development of designated lands can contribute to the demand for high-quality, residential, mixed-use in-fill developments, of vibrant, livable communities on the university and in the city's core.

## **GOVERNMENT OF ALBERTA FUNDING**

Current funding levels of the Infrastructure Maintenance Program (IMP) grant, together with recent one-time project transfers, has until now allowed the university to maintain its trend in reducing its deferred maintenance liability. However, reductions to the base IMP grant have caused a setback over the longer term. Restoration of IMP funding to 2011–2012 levels is critical for preventing increases in our deferred maintenance liability and reducing the risk of catastrophic failure of some building systems. The university has a number of "shovel ready" deferred maintenance projects that could quickly be put in place with increases to base IMP funding and additional one-time grants for large renewal projects. Projects that have been identified have designs complete; will address maintenance backlog, health and safety, and optimize the use of existing infrastructure.

- **Preservation projects:** Projects funded and undertaken in recent years have resulted in reductions in the Facility Condition Index (FCI) of some facilities.
- **Renewal and backfill projects:** Prudent project management of capital projects has resulted in positive project variances. These variances have been re-directed to existing facilities to address renewal and backfill needs. A number of repurposing and renewal projects have been identified in close collaboration with government and are being completed.

## **ONGOING PARTNERSHIPS WITH COMMUNITIES, POST-SECONDARY INSTITUTIONS, AND PRIVATE ORGANIZATIONS**

- Canada Foundation for Innovation (CFI) contributions: Over the last 10 years, the university has received approximately \$150 million from CFI for major infrastructure purchases, including equipment, renovation, and new construction. This funding has directly leveraged approximately \$225 million from other sources, including the province of Alberta, corporate partners, and other funding agencies.
- TEC Edmonton: TEC Edmonton has provided tremendous growth and program opportunities for all partners; recently rated one of the top incubators operating in North America. TEC Edmonton has indicated a desire and need to expand within Enterprise Square and is currently seeking funding for this work.
- Islamic Garden: In June 2009, His Highness the Aga Khan announced plans to create a traditional Islamic garden within the university's Devonian Botanic Garden in recognition of the growing partnership between the university and the Aga Khan University. Design is advancing to facilitate the proposed garden and building infrastructure and will be construction-ready in 2016. The Ecological Learning Centre is a critical piece of garden infrastructure that is intended to integrate this and other gardens within the Devonian Botanical Garden site, providing learning and research space, community outreach programs, and visitor and tourism support. Designs have commenced related to site infrastructure based on current Government of Alberta support.
- The Galleria project (E-DACC): This proposed project continues to progress and we look forward to government's commitment. Proposed new infrastructure for the departments of music, and art & design would satisfy their enrolment and program requirements. The Galleria is an innovative collaboration involving private philanthropy, corporate investment, and public funding involving all orders of government in a lease-to-own initiative.
- Translational labs: Alberta is reviewing its diagnostic lab strategy, including the consolidation of provincial labs for northern Alberta. There is significant value to be realized through the development of an integrated lab facility that combines diagnostic lab functions with research/translational labs to encourage lab bench research to be utilized to develop faster, more accurate, and less expensive testing procedures. The integrated facility will provide opportunities not only to advance research, but also to provide the training environment for our future lab technicians through the creation of a new centre of excellence for the city, the province and the country.
- U of A District Energy System: The university's District Energy System provides substantial savings in utility costs not only to the university, but also to other taxpayer-funded institutions in the greater campus area (GCA), such as the hospitals, the Jubilee Auditorium, Canadian Blood Services, Alberta government facilities, etc. The university's District Energy System returned a portion of its reserves back to the partners in the GCA to mitigate the effects of provincial budget cuts. This occurred over 2014–2015 and amounted to a ten per cent reduction of utility costs for system users. Over the last five years, the university's purchase prices for natural gas and power have been the lowest amongst the major post-secondary institutions in Alberta, averaging 25 per cent less for natural gas and 28 per cent less for power. The substantial savings generated from our activities in Alberta's deregulated energy markets enable all of our customers to pursue more efficiently their core missions of teaching, research, and medical services. Students in residence on North Campus also benefit from the lower utility costs.

Additional benefits for all customers are the high reliability of services obtained and lower environmental impact due to efficiencies in operating large central facilities.

- U of A utility group: The university's utility group provides expertise in utility matters to smaller institutions and partners, such as Lakeland College and the Downtown Arts District initiative.
- South Campus Arena Development: The university and the City of Edmonton have recently executed a Memorandum of Understanding to investigate and develop a new Twin Arenas facility that would meet common community and programming objectives supported by sound business case profiles and a rigorous community consultation process while addressing deferred maintenance liabilities.

## **MAJOR FUNDED CAPITAL PROJECTS UNDERWAY**

- Student housing: Residence projects underway add a total of 962 beds to our inventory and will increase the university's ability to provide housing to 18.1 per cent of full-time students. These new residences will provide housing for faculty cohorts, and support the university's goal of providing purpose-built housing for up to 25 per cent of its full-time student population. Residences are being developed through debt financing by the institution.
  - Peter Lougheed Hall: This residence expansion project will add 142 beds to our on-campus housing inventory. The new residence will support the Peter Lougheed Leadership College, part of the larger Peter Lougheed Leadership Initiative between the U of A and The Banff Centre, focused on leadership development of undergraduate students.
  - East Campus Village 9: This facility will accommodate up to 300 upper-year undergraduate students in four and six bedroom apartments. This new community features fitness, social, study, project, and amenity spaces designed to enhance the student experience.
  - Lister Hall Tower 5: This new community will accommodate up to 520 students (based on double occupancy) in a modern, dormitory-style community designed to enhance the experience of students in their first year. This project is key to delivering on the university's new initiative regarding first-year housing guarantees for all students admitted to the university for the first time.
- Research and Collection Resource Facility (RCRF): This records repository project involves construction of a purpose-built facility of approximately 3,437 gross square metres to house 5.1 million volumes (anticipated requirement to 2035) on South Campus with easy access. The new facility will include all required environmental and retrieval systems expected in a modern records depository and will be expandable to accommodate future needs. It will provide outstanding opportunities for increased student access to archives and for expanded academic initiatives. Institution debt funding is being provided.
- Devonian Garden infrastructure: In collaboration with the proposed Islamic Garden capital program, the gardens' current aged and missing infrastructure (roads, gas, power, and sewer) will be upgraded to a standard to facilitate the planned development and increased visitorship to the garden.

## **ADDITIONAL CAPITAL PLANNING CONSIDERATIONS**

### **FINANCIAL STRATEGIES TO SUPPORT CAPITAL**

There is a significant need for long-term funding certainty to facilitate institutional initiatives. Though there will likely always be a need for traditional provincial investment through one-time grants, the university is committed to seeking other opportunities and avenues that minimize this dependency:

- **Borrowing:** It is critically important that the university work with government and its financial entities to develop alternative financial models that address current fiscal constraints within government. Borrowing is part of planning and building an internationally recognized research-intensive institution that will attract the best and the brightest faculty and students in the years to come.
- **Alternative financing arrangements:** Along with pursuing innovative partnerships for property development, the university also looks for alternative financing arrangements where feasible and advantageous. Increasingly, the funding of projects in this plan will reflect the partnerships noted above and will include funds from multiple sources. Donations, as well as partner contributions including lease-to-own options, will be sought and used to complete needed facilities. Leasing options will also be considered to lessen the demand for capital funding. The university will continue to seek ways to involve the private sector in the repair, development, and operation of new and existing housing inventory.
- **Partnership development:** Opportunities to develop partnerships could allow the university to leverage funding and develop its physical resources in a cost-effective manner. While partnerships present a major opportunity for the university to develop its physical resources in an innovative and cost effective manner, they also present greater challenges to the institution. First, the institution, along with government as its primary funding partner, must work within current public policy. Second, the university must carefully weigh the advantages apparent in a partnership arrangement against the potential loss of control over the future of its resources.

#### **OTHER INFLUENCES AND CHALLENGES**

Operating costs for high-intensity research facilities may still be greater than the funding provided through base operating grants. The university must carefully monitor actual costs in these facilities to determine whether a significant shortfall continues and report to government accordingly.

While the university appreciates and acknowledges the government's efforts to provide lights-on funding for new infrastructure, failure to provide funding that bridges the difference between the lower historic funding and today's funding requirements has resulted in a significant operational shortfall to the institution. This has affected overall operational service levels across our campus for existing facilities. As buildings are repurposed to accommodate additional research-intensive programming, there is also a need to review operating costs and associated funding requests for differential lights-on funding to accommodate program change within a building.

The lack of available and affordable child-care options on campus is becoming a deterrent not only to the recruitment of staff and faculty, but also to the attraction and retention of graduate students and students from historically under-represented groups, such as Indigenous people.

For new construction provided through Government of Alberta grants, there is a requirement to achieve the LEED® Silver certification level. The U of A is fully committed to sustainable construction and operations and designs to critical sustainability principles in its projects. We continue to engage government on the most economical means of validating building designs and operations in the interest of meeting sustainability goals. The university is also actively pursuing alternative, cost-effective strategies to provide equal or greater certification levels at a lower cost. Consideration for alternate certification systems allowing for more prudent application of grant funds must be considered.

The age of U of A facilities presents a challenge because required use and function may not match in the spaces that are available. Renewal of aged facilities is required to deal with functional issues and provide more appropriate space.

With the development of a land trust, the university may be able to monetize land assets to support its core academic and research needs.



**TABLE 8 HIGHEST NEW CAPITAL PRIORITIES (LISTED IN ORDER OF INSTITUTIONAL PRIORITY)**

PROJECT	DESCRIPTION\SCOPE	NEW SPACE & RENO. (M <sup>2</sup> )	ESTIMATED COST	TIMELINES	STRATEGIC ALIGNMENT	FUNDING SOURCE	FUNDING SOURCE (NON-GOVERNMENTAL)
Maskwa House of Learning	Centre focused on Aboriginal students, faculty and staff to serve as a community gathering place that embraces and provides an inclusive and supportive learning environment. Project will be aligned with current Education Tower location and will be aligned with the building's current infrastructure and program areas. The university has secured a donation of \$1M to initiate the project.	2,500	\$30M	2018	Faculty Renewal - P4, EO2, PM4  Student Experience - P5, EO3, PM3	Philanthropy and Government Support	\$1M
Galleria	Development of space that would house the Department of Music and the Department of Art & Design in partnership with a private sector developer. The budget represents the potential equity required within the partnership arrangement.	32,500	\$175M	2019	Community Engagement - P1, EO1, PM1  Infrastructure - P4, EO4, PM4	Philanthropy and Government Support	
Translational Lab - The Edmonton Clinic Diagnostic Centre	Addition of one floor to the AHS proposed Diagnostic Centre to house its lab services provider.	7,990	\$60M	2020	Faculty Renewal - P4, EO2, PM1  Community Engagement - P1, EO3, PM1	Government Support	

Twin Arenas South Campus	The Twin Arenas Project is part of the long range plan of moving all varsity programs to South Campus and having these buildings serve not just the university, but the community at large. This facility will provide needed space for our hockey, wrestling and golf program and will provide needed administrative, learning, and research space associated with our varsity programs. This facilitates the replacement and relocation of our aging and antiquated metabolic facility.	14,954	\$81 M	2019	Community Engagement - P1, EO3, PM1	Partnership, Philanthropy, Borrowing and Government Support (from all three orders).	
Alberta School of Business – New Facility	Development of a building for the School of Business in a partnered opportunity with private sector. A building for the School of Business would facilitate accommodation of the backfill requirements of the social sciences and support their growth needs. The social sciences are currently experiencing significant shortfall of space.	27,900	\$185M	2020	Infrastructure - P4, EO4, PM2	Philanthropy and Government Support	
South Campus Basic Infrastructure	New infrastructure to support the development of the NE sector of South Campus – deep sewer, water supply, road lighting, and improvements specifically to support the siting of community complexes on campus.	N/A	\$15.6M	2018	Infrastructure - P1, EO1, PM1	Government Support	

<p>Development of South Campus Infrastructure - Utilities/District Energy Plant</p>	<p>Installation of a district energy system, incorporating a combined heat and power plant (CHP) to service the developments on South Campus. The new system will be modelled after the North Campus system that has proven to be successful in terms of energy efficiency, reduction in GHG emissions, and energy cost reduction. It will include a full range of utility services including power, steam, chilled water, domestic water, compressed air, and storm and sanitary services. The system will be designed to follow the growth of South Campus and to accommodate green technologies as they become economically viable.</p>	<p>N/A</p>	<p>\$132.2M</p>	<p>2021</p>	<p>Infrastructure - P1, EO1, PM1</p>	<p>Government Support and Partnership and Business Case</p>	
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**TABLE 9 HIGHEST EXPANSION PRIORITIES (LISTED IN ORDER OF INSTITUTIONAL PRIORITY)**

PROJECT	DESCRIPTION\SCOPE	NEW SPACE (M <sup>2</sup> )	ESTIMATED COST	TIMELINES	STRATEGIC ALIGNMENT	FUNDING SOURCE	FUNDING SOURCE (NON-GOVERNMENTAL)
Augustana Science Labs Expansion and Renewal and Classroom Building Upgrade	Increased capacity/ accessibility and deferred maintenance - Expansion and renovation of the existing building and infrastructure to meet the needs of the student enrolment and science program requirements. This is coupled with the need to repurpose the old library space to classrooms with the completion of the Library/Forum project (phased)	6,592	\$90M Work can be Phased	2020	Faculty Renewal - P4, EO2, PM1,  Teaching and Learning - P1, EO1, PM1	Government Support	
Campus Saint-Jean Science Building	Increased capacity/ accessibility and deferred maintenance - Expansion and renovation of existing facility to meet the needs related to differential program enrolment throughout the entire campus, the creation of new programs and partnerships with other faculties, and dedicated research space, which will allow opportunities for reuse within the backfill area. The university is targeting an additional \$10M in federal support. Total project estimate is \$46.4M (phased)	5,319	\$40M (Work can be phased)	2020	Community Engagement - P3, EO3, PM1	Government Support	

NREF Backfill	Conversion of floors to wet lab, conversion of fume hoods and base building system upgrades	N/A	\$38M	2018	Infrastructure - P4, EO4, PM4	Government Support	
Science Backfill	Deferred maintenance and increased capacity/ accessibility - Various backfill renewal and repurposing of space as a result of the completion of CCIS (BioSci, Earth Sciences, Chemistry, South Academic Building)	N/A	\$21.1M	2020	Research Excellence - P2, EO2, PM3	Government Support	
ECERF Backfill	Conversion of floors for Nano Engineering, BioMed Engineering, and NanoBioengineering, and new ventilation system. Conversion of floors to accommodate dry labs for Electrical and Computer Engineering	N/A	\$25M	2018	Infrastructure - P4, EO4, PM4	Government Support	
Mechanical Engineering	Replacement and higher-density development, reduction in deferred maintenance	N/A	\$75M	2020	Infrastructure - P2, EO4, PM2	Government Support	
North Campus Electrical Utility System Expansion	The North Campus electrical utility system requires an expansion to incorporate the addition of future precinct large building additions (AHS, UA, CC)	N/A	\$20M	2020	Infrastructure - P1, EO1, PM1	Government Support	

**TABLE 10 HIGHEST PRESERVATION PRIORITIES (LISTED IN ORDER OF INSTITUTIONAL PRIORITY)**

PROJECT	DESCRIPTION\SCOPE	ESTIMATED COST	TIMELINES	STRATEGIC ALIGNMENT	FUNDING SOURCE	FUNDING SOURCE (NON-GOVERNMENTAL)
Chemical and Materials Engineering Building – Renewal (Phase 2) (R)	Deferred Maintenance / Increased capacity- Renewal and repurposing of the building to provide needed wet lab space for Engineering and address building envelope and operational issues. Phase 2 is the continuation of the project and would fully renew the existing building. Due to the critical need for this space, the Faculty of Engineering is providing bridge financing of \$5M toward Phase 2 of the renewal in advance of government funding.	\$22.1M	2020	Research Excellence - P2, EO2, PM3	Government of Alberta \$58.7M	
Turbine Generator 3	Reliability/Reduction of GHG emissions/Energy cost reduction - Project intent is to install a gas turbine - generator and heat recovery steam boiler that will generate 25 MW of power and 70,000 kg/hr of high-pressure steam. Power and steam will increase the reliability of the fleet and provide energy cost reduction for the U of A and campus partners including the University Hospital, Cross Cancer Institute, Canadian Blood Services, and the Jubilee Auditorium. Maximum efficiency will be achieved through the units co-generation cycle. Power generated through the new	\$89.2M TPC	2020	Infrastructure - P1, EO1, PM1	Government of Alberta \$47.5M (53.3 per cent)  Utilities (Borrowed): \$41.7M (46.7 per cent)	

	unit will reduce GHG emissions by 40 per cent when compared with conventional power production.					
Dentistry/ Pharmacy	Deferred Maintenance/ Increased capacity and accessibility - Functional renewal of the building now that the Edmonton Clinic Health Academy is complete and faculties have relocated. The existing building, constructed in 1921, has a high deferred maintenance liability and must be completely retrofitted before new tenants can be moved in. This project restores and reuses historically significant building to the campus, allows for greater administrative efficiencies with the co-locating of many of our central services, reducing demand for outside leases, and most importantly builds a new front door for our campus to the community of prospective students, current students, and alumni. The university is also preparing a phasing plan that, while increasing the costs, will allow for the project to continue advancing as funding becomes available.	\$270M -- can be addressed in four to five phases of work of approximately \$50 M per phase	Pre-design and budgeting complete. Engineering for Phase 1 underway.  Phase 1 - 2017 Phase 2 - 2018 Complete project 2020	Supports All Goals	Government of Alberta - \$270M - to be phased over a four to five year construction period.	
MSB	Phase 1: Deferred Maintenance/Increased capacity and accessibility -- Select building renewal and repurposing/backfill to occur once the Edmonton Clinic Health Academy is complete.	\$30M	2018	Infrastructure - P2, EO2, PM2	Government Support	

	Phase 2: Deferred Maintenance/Increased capacity and accessibility - Full facility renewal program and backfill.					
CSB	<p>Phase 1: Deferred Maintenance/Increased capacity -- Building renewal and backfill with the completion of Edmonton Clinic Health Academy is complete. Focus is for renewal and repurposing. The project would be approached in three phases of renewal of the tower. Phase 1 is for design and building prep for phased renewal.</p> <p>Phase 2: Deferred Maintenance/Increased capacity -- Building renewal and backfill with the completion of Edmonton Clinic Health Academy is complete. Focus is for renewal and repurposing. Phase 2 would accommodate 1/3 of the project and allow for decanting of remaining tower.</p>	\$11.8	2018	Infrastructure - P2, EO2, PM2	Government Support	
Universiade Pavilion	Deferred Maintenance/ Increased capacity/Addresses climate change - Renewal of building envelope to replace failing panels.	\$16M	2017 Concept design and community engagement is complete	Teaching and Learning - P1, EO2	Government Support	



**TABLE 11 HIGHEST RENEWAL PRIORITIES (LISTED IN ORDER OF INSTITUTIONAL PRIORITY)**

PROJECT	DESCRIPTION/SCOPE	ESTIMATED COST	TIMELINES	STRATEGIC ALIGNMENT	FUNDING SOURCE	FUNDING SOURCE (NON-GOVERNMENTAL)
Chemistry Electrical Vaults	Condition of the primary switchgear is very poor and requires replacement. Review of all electrical rooms on campus has identified that the electrical service for this facility is at capacity, is the highest priority for replacement and now presents a life safety risk for maintenance activities. Additionally there is no standby power source for the building life safety systems. The project has been elevated to a top priority with the Government of Alberta and has a high risk.	\$11.6M	Design 2016 Construction 2017	Infrastructure - P1, EO1, PM1	Government Support	
CMEB Envelope and Elevator	CMEB is a facility that has been going through a phased renewal program. This project will address renewal of elevators, window replacement and upgrade of exterior doors.	\$7M	2017	Infrastructure - P1, EO1, PM1	Government Support	
Chemistry West – Floor Renewal	Deferred Maintenance/ Increased capacity and accessibility - As the base building upgrade and renewal work is now completed, the delivery model for the remaining fit-outs can be accommodated as smaller phases of work.	\$4M	2017	Infrastructure - G9	Government Support	

Cameron Library Envelope	Marble exterior panels are falling off of the north face of Cameron Library. Replacement of the panel system to match the south face (which had a similar issue) is required.	\$3.6M	2017	Infrastructure - P1, EO1, PM1	Partner with Energy Management Program  \$1M EMP \$2,6M Government of Alberta	
General Elevator Program	Renewal program for aged elevator controls, drives and cabs, and single bottom hydraulic cylinder elevators on a campus wide basis. The university has to commence a program for renewal of elevator assets as we are experiencing failures with many of the older units. There are 12 single bottom hydraulic elevators on campus requiring upgrades. Failures in facilities with single elevators may result in loss of access to facilities by mobility impaired staff. Failures will have a direct impact on ability to move people in larger multi-story facilities.	\$8.5M	2016 through 2019	Infrastructure - P1, EO1, PM1	Government Support	
Agriculture Forestry Lab	Deferred Maintenance/ Increased capacity - Upgrade base building infrastructure to allow for full functional renewal of laboratory spaces. This will permit increased program use in the facility.	\$3.4M	2016	Research Excellence - P2, EO2, PM3	Government Support	

# Appendix G: Information Technology

## **IT Support for Research**

The 2016–2018 priority for research is local data storage. This is an intermediate use-case between the active storage associated with high-performance computing facilities like WestGrid, and the long-term archival storage proposed by Research Data Canada. Many researchers require a place to store large amounts of data (tens to hundreds of terabytes) while it is still needed for ongoing research. That is the purpose of our proposed six-petabytes local data store.

The funding source is the Campus Alberta Grant, at an approximate cost of \$600,000.

## **IT Support for Access**

Access priorities for 2016–2018 are improved processes for undergraduate admissions, and better management of graduate student scholarships and awards. Both initiatives will have IT components. These have been estimated at:

- \$3 million for undergraduate admissions, expended as \$1 million per year for three years, and
- \$1 million for graduate student scholarships and awards, expended in one year

Together, these two projects will require \$2 million in 2016–2017. Both will draw their funding from the Campus Alberta Grant.

## **IT Support for Teaching and Learning**

IT infrastructure support is needed to achieve the teaching and learning goals of the institution. Primarily, this includes greater capacity to use digital learning technologies to enhance learning experiences on a university campus as well as from a distance. To achieve these goals, classrooms must be modified to have greater access to broadband wireless to allow for using digital and Internet resources. Current wireless capacity does not permit an entire class of students (up to several hundred) to simultaneously access digital resources (such as digital learning modules, video segments, or interactive learning objects) or Internet resources (such as websites that support statistical analysis). Additionally, live-streaming capabilities are required to enable distance learners to access classes offered on a campus. Furthermore, better integration within Campus Alberta would be permitted by facilitating students at other institutions outside Edmonton to engage with U of A classes to enrich their learning experience, to offer collaborative programming (e.g., the Aboriginal Teacher Education Program offered by the Faculty of Education), or to offer distance learning (e.g., the Canmore learning sites that engage with North Campus physical therapy courses through digital communications technology).

## **IT Support for Efficiency and Sustainability**

IT infrastructure has evolved impressively and now allows for much more efficient methods of undertaking traditionally cumbersome processes at the university (such as annual reporting by staff and units on their productivity) and data capture; for better monitoring of student enrolment and progress, research funding, professor- and unit-level productivity; and for better information sharing regarding research findings.

Over the next three years, the U of A will be focusing on establishing greater efficiency and sustainability of processes across the institution.