

The following Motions and Documents were considered by the Board Learning and Discovery Committee at its Monday, February 29, 2016 meeting:

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

APPROVED MOTION: THAT the Board Learning and Discovery Committee, on the recommendation of the General Faculties Council Academic Planning Committee, recommend that the Board of Governors approve the 2016 *University of Alberta Comprehensive Institutional Plan (CIP)* related to matters concerning the teaching and research affairs of the University, as set forth in Attachment 1 to the agenda documentation, and 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 recommended item: 5.

Agenda Title: **Proposal for a (New) Post-Baccalaureate Certificate in Indigenous Sport and Recreation, the Faculty of Graduate Studies and Research and the Faculty of Physical Education and Recreation in partnership with the Faculty of Native Studies**

APPROVED MOTION: THAT the Board Learning and Discovery Committee, acting with delegated authority of the Board of Governors and on the recommendation of the GFC Academic Planning Committee, approve the (new) Post-Baccalaureate Certificate in Indigenous Sport and Recreation, as submitted by the Faculty of Graduate Studies and Research and the Faculty of Physical Education and Recreation in partnership with the Faculty of Native Studies, and as set forth in Attachment 1, for implementation in Fall 2016.

Final item: 6.

Agenda Title: **Proposal for a (New) Post-Baccalaureate Certificate Bridging to Canadian Physical Therapy Practice, Faculty of Graduate Studies and Research and Faculty of Rehabilitation Medicine**

APPROVED MOTION: THAT the Board Learning and Discovery Committee, acting with delegated authority of the Board of Governors and on the recommendation of the GFC Academic Planning Committee, approve the (new) Post-Baccalaureate Certificate Bridging to Canadian Physical Therapy Practice, as proposed by the Faculty of Graduate Studies and Research and the Faculty of Rehabilitation Medicine, and as set forth in Attachment 1, for implementation in September 2016.

Final item: 7.

OUTLINE OF ISSUE

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

Motion: THAT the Board Learning and Discovery Committee, on the recommendation of the General Faculties Council Academic Planning Committee, recommend that the Board of Governors approve the 2016 *University of Alberta Comprehensive Institutional Plan (CIP)* related to matters concerning the teaching and research affairs of the University, as set forth in Attachment 1 to the agenda documentation, and empower administration to make any editorial changes to the CIP, as needed, as long as the changes do not have the force of policy.

NOTE - BOARD MOTION:

Motion: THAT the Board of Governors, on the recommendation of the Board Finance and Property Committee and the Board Learning and Discovery Committee, approve the 2016 University of Alberta Comprehensive Institutional Plan (CIP), as set forth in Attachment 1, and 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 (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 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
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. Post-Secondary Learning Act (PSLA) 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 [...] (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. Post-Secondary Learning Act (PSLA) Section 78 states:</p> <p>“Business plans</p> <p>78(1) Each year a board must prepare and approve a business plan that includes (a) the budget, and (b) any other information required by the Minister.</p> <p>(2) 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>Access plan</p> <p>78.1 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. Post-Secondary Learning Act (PSLA) Section 80 states: “The board must submit to the Minister any reports or other information required by the Minister.”</p>

4. **GFC Academic Planning Committee Terms of Reference/3. Mandate of the Committee:** “The Academic Planning Committee (APC) is GFC's senior committee dealing with academic, financial and planning issues. [...]

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:

1. Planning and Priorities: 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.

[...]

4. Budget Matters [...]

b. To recommend to the Board of Governors on the annual budget, excluding budgets for ancillary units.”

5. **Board Finance and Property Committee (BFPC) Terms of Reference, Section 3.c.** states that the Committee shall “[...] review and recommend to the Board the annual and other budgets and major issues of policy related to budgets[.] [...]”

6. **Board Learning and Discovery Committee (BLDC) Terms of Reference/Mandate of the Committee (Section 3):** “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:
[...]

f. undertake studies and review academic matters that pertain to the quality of the educational experience at the University;

g. monitor educational and research trends, community expectations and demands;

[...]

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;

j. consider future educational expectations and challenges to be faced by the University[.] [...]”

Routing (Include meeting dates)

<p>Participation: (parties who have seen the proposal and in what capacity)</p> <ul style="list-style-type: none"> • Those who have been informed • Those who have been consulted • Those who are actively participating 	<p>President's Executive Committee (review of draft), January 28, 2016; Joint BFPC/Board of Governors/GFC- APC- CIP Briefing – February 5, 2016</p>
<p>Approval Route (Governance) (including meeting dates)</p>	<p>GFC Academic Planning Committee (for recommendation), February 10 2016 Board Learning and Discovery Committee (for recommendation - per Committee mandate) February 29, 2016 Board Finance and Property Committee (for recommendation - per Committee mandate) March 1, 2016 Board of Governors (for final approval) – March 18, 2016</p>
<p>Final Approver</p>	<p>Board of Governors</p>

Attachment:

1. University of Alberta Comprehensive Institutional Plan 2016 (93 pages)

Prepared by: Andrea Smith, SAO, Office of the Vice-President (University Relations) andrea.smith@ualberta.ca

UNIVERSITY OF ALBERTA COMPREHENSIVE INSTITUTIONAL PLAN 2016

DRAFT: January 29, 2016

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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.

Goals – Faculty Renewal		
Type	Description	Expected Completion Date
G1 Faculty Renewal	To renew the professoriate, improving the balance of ranks and increasing diversity.	2020
Priority Initiatives – Faculty Renewal		
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"> • Maskwa House of Learning: 2018 (Table 1 - New Capital Priorities) • Translational Lab: 2020 (Table 1 - New Capital Priorities) • Galleria Project: 2019 (Table 1 – New Capital Priorities) • Augustana Science Labs: 2020 (Table 2 - Expansion Priorities)
Expected Outcomes – Faculty Renewal		
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																																			
Performance Measures – Faculty Renewal																																								
PM 1 Increase assistant professors to 21 per cent of the total number of faculty.	<table border="1"> <thead> <tr> <th></th> <th>Last Actual 2015-16</th> <th>Target 2016-17</th> <th>Target 2017-18</th> <th>Target 2025</th> </tr> </thead> <tbody> <tr> <td>Proportion of assistant professors</td> <td>17%</td> <td>17%</td> <td>18%</td> <td>21%</td> </tr> <tr> <td colspan="5">Source:</td> </tr> <tr> <td colspan="5">Acorn Data Warehouse, as of Jan. 7, 2015.</td> </tr> <tr> <td colspan="5">Notes:</td> </tr> <tr> <td colspan="5">Data are as of Oct. 1, 2015.</td> </tr> <tr> <td colspan="5">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 ¹
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PM 2 Increase Indigenous faculty members by 50 per cent from 17 to 26.	<table border="1"> <thead> <tr> <th></th> <th>Last Actual 2014-15</th> <th>Target 2016-17</th> <th>Target 2025</th> </tr> </thead> <tbody> <tr> <td>Number of Indigenous faculty members</td> <td>17</td> <td>17</td> <td>26</td> </tr> <tr> <td colspan="4">Source:</td> </tr> <tr> <td colspan="4">Equity Office</td> </tr> <tr> <td colspan="4">Notes:</td> </tr> <tr> <td colspan="4">Data are as of Dec. 31 of the reported year.</td> </tr> <tr> <td colspan="4">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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	Equity Office																																							
	Notes:																																							
Data are as of Dec. 31 of the reported year.																																								
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¹ 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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Goals – Student Experience		
Type	Description	Expected Completion Date²
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
Priority Initiatives – Student Experience		
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

² 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. ³	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
Expected Outcomes – Student Experience		
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

³ 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																					
Performance Measures – Student Experience																							
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 1104 753"></th> <th data-bbox="1104 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 1104 919">Proportion of Alberta undergraduate students from outside of Edmonton</td> <td data-bbox="1104 753 1276 919">32%</td> <td data-bbox="1276 753 1425 919">32%</td> </tr> <tr> <td colspan="3" data-bbox="619 919 1425 964">Source:</td> </tr> <tr> <td colspan="3" data-bbox="619 964 1425 1010">Acorn Data Warehouse as of Jan. 7, 2015.</td> </tr> <tr> <td colspan="3" data-bbox="619 1010 1425 1055">Notes:</td> </tr> <tr> <td colspan="3" data-bbox="619 1055 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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Excludes medical/dental residents.																							

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

Source County of International Students , 2015-2016		
Graduate	China	920
	Iran	414
	India	248
	USA	134
	Bangladesh	100
	Saudi Arabia	69
	Brazil	64
	Pakistan	56
	Nigeria	55
	Egypt	54
Undergraduate	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 1669 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>UHC⁴</td> <td>Total visits</td> <td>49,540</td> <td>48,953</td> <td>47,595</td> </tr> <tr> <td>CCS⁵</td> <td>Direct treatment</td> <td>10,025</td> <td>12,189</td> <td>12,474</td> </tr> <tr> <td>Pharm⁶</td> <td>Prescriptions filled</td> <td>35,456</td> <td>35,420</td> <td>34,906</td> </tr> <tr> <td>SAC⁷</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 ⁴	Total visits	49,540	48,953	47,595	CCS ⁵	Direct treatment	10,025	12,189	12,474	Pharm ⁶	Prescriptions filled	35,456	35,420	34,906	SAC ⁷	Support sessions	206	217	255	SAC	Psychological services	n/a	287	430	Ongoing
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⁴ University Health Centre

⁵ University of Alberta Counselling and Clinical Services

⁶ University of Alberta Pharmacy

⁷ University of Alberta Sexual Assault Centre

PM5 Graduate satisfaction	Graduate satisfaction as reported in the Alberta Graduate Outcomes Survey.			Ongoing	
	Graduate Satisfaction with their educational Experience	Last Actual 2014	Target 2016		Target 2018
	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.				
Goals – Teaching and Learning					
Type	Description			Expected Completion Date	
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	
Priority Initiatives – Teaching and Learning					
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. ⁸			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	
Expected Outcomes – Teaching and Learning					
EO1 Increased emphasis on new teaching methods	Increase the uptake of new models for instructional design, assessment, and teaching by the professoriate.			2020	

⁸ 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		Last Actual 2014-15	Target 2015-16	Target 2016-17	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	
		Last Actual 2014-15	Target 2015-16		Target 2015-16
	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.					

Goals – Research Excellence		
Type	Description	Expected Completion Date
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. ⁹	2020
Priority Initiatives – Research Excellence		
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

⁹ 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	
Expected Outcomes – Research Excellence			
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	
Performance Measures – Research Excellence			
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	
			Last Actual 2014
	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="558 155 921 245">Number of tri-council scholarship awards, U15 relative position</th> <th data-bbox="926 155 1098 245">Last Actual, 2013-14</th> <th data-bbox="1102 155 1266 245">Target, 2016-17</th> </tr> </thead> <tbody> <tr> <td data-bbox="558 248 921 289">SSHRC</td> <td data-bbox="926 248 1098 289">7</td> <td data-bbox="1102 248 1266 289">7</td> </tr> <tr> <td data-bbox="558 292 921 332">CIHR</td> <td data-bbox="926 292 1098 332">3</td> <td data-bbox="1102 292 1266 332">3</td> </tr> <tr> <td data-bbox="558 336 921 376">NSERC</td> <td data-bbox="926 336 1098 376">5</td> <td data-bbox="1102 336 1266 376">5</td> </tr> <tr> <td colspan="3" data-bbox="558 380 1266 420">Source:</td> </tr> <tr> <td colspan="3" data-bbox="558 423 1266 480">U15 tri-council report, includes scholarship awards from CIHR, NSERC, and SSHRC.</td> </tr> <tr> <td data-bbox="558 513 861 638">Post-doctoral fellow tri-council awards, U15 relative position</td> <td colspan="2" data-bbox="865 513 1266 638">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="558 800 1524 889">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="558 898 1041 971">Grant Assist Program, Number of Reviews</th> <th data-bbox="1045 898 1339 971">Last Actual</th> </tr> </thead> <tbody> <tr> <td data-bbox="558 974 1041 1047">Health Sciences (est. 2010)</td> <td data-bbox="1045 974 1339 1047">1,376</td> </tr> <tr> <td data-bbox="558 1050 1041 1123">Natural Sciences and Engineering (est. 2013)</td> <td data-bbox="1045 1050 1339 1123">214</td> </tr> <tr> <td data-bbox="558 1127 1041 1200">Social Sciences and Humanities (est. 2013)</td> <td data-bbox="1045 1127 1339 1200">226</td> </tr> <tr> <td colspan="2" data-bbox="558 1203 1339 1243">Notes:</td> </tr> <tr> <td colspan="2" data-bbox="558 1247 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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PM5 Maintain or improve our	Maintain or improve our relative position in the U15 group of universities	Ongoing																					

relative position in the U15 group of universities for total sponsored research funding.	for total sponsored research funding.			
		Last Actual 2013-14	Target 2014-15	Target 2015-16
	Sponsored research funding, U15 relative position	5	5	5
Goals – Community Engagement				
Type	Description			Expected Completion Date
G8 Expand community engagement and consultation	Increase community interactions to build two-way relationships with stakeholders on and off campus including urban, rural, Indigenous, and minority communities and their leaders.			2020
Priority Initiatives – Community Engagement				
P1 Shared community infrastructure projects	<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 Galleria 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 Twin Arenas (Table 8, Appendix F) project will provide needed space for academic, varsity, community and recreational sport activities.</p> <p>The Translational Lab—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>
P2 Increase engagement with communities and stakeholders on and off campus	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.			2020
P3 Create partnerships and	Increase and promote partnerships for community service-learning, co-op,			2020

programs and presentations that include face-to-face interactions	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.																	
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																
Expected Outcomes – Community Engagement																		
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																
Performance Measures – Community Engagement																		
PM1 Public interaction	<table border="1"> <thead> <tr> <th colspan="2">Community Engagement</th> </tr> <tr> <th></th> <th>Last Actual</th> </tr> </thead> <tbody> <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> <tr> <td colspan="2">CSL course placements are for the 2014-15 academic year.</td> </tr> </tbody> </table>	Community Engagement			Last Actual	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		CSL course placements are for the 2014-15 academic year.		2020
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	<p>Alumni connections include connections with alumni, students, and their guests in the 2014-15 fiscal year.</p>	
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Goals – Infrastructure¹⁰		
Type	Description	Expected Completion Date
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, Phase 1</i>). 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
Priority Initiatives – Infrastructure		
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

¹⁰ 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
Expected Outcomes – Infrastructure		
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
Performance Measures – Infrastructure		
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 ₂ 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

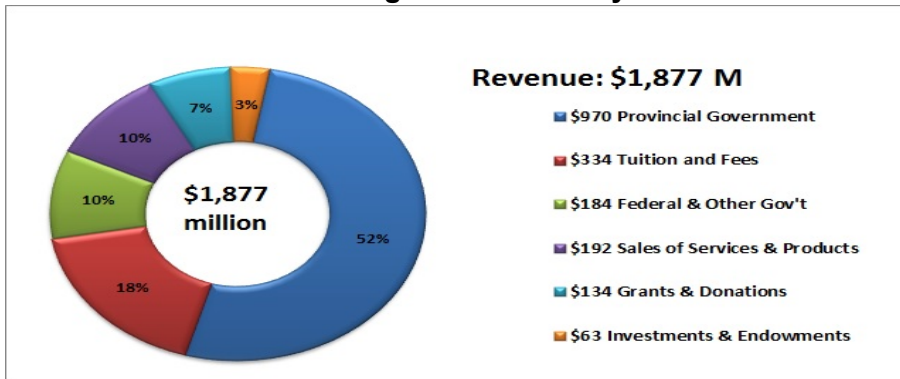
regulation and MNIF to increase by Alberta CPI.

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.

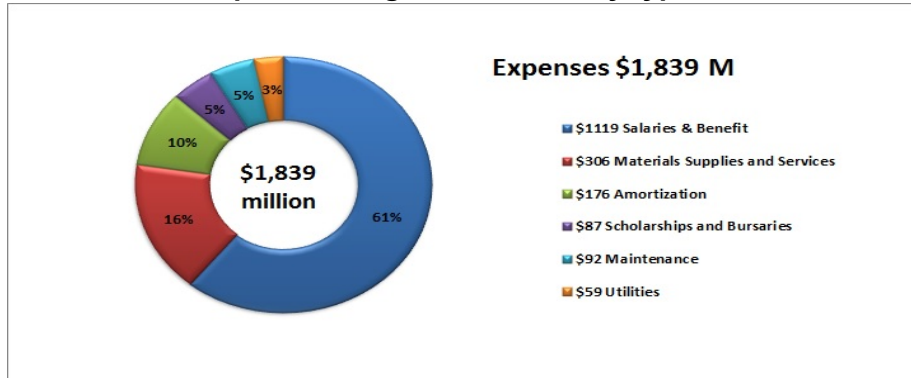
In addition to the negotiated changes to salaries and benefits, the university must also budget for inflationary increases to non-statutory benefits such as supplementary health plans, any statutory benefit increases, and adjustments to pension plan contributions in response to unfunded pension plan 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
Revenue:						
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
Total revenue	1,822,990	1,833,083	1,876,603	1,891,309	1,935,480	1,985,061
Expense:						
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
Total Expense	1,799,816	1,814,750	1,838,982	1,867,013	1,925,719	1,986,081
Excess of Revenue Over Expense	23,174	18,333	37,621	24,296	9,761	(1,020)
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)
Unrestricted Net Assets, End of Year	(44,956)	(59,216)	(69,455)	(68,203)	(70,140)	(98,605)

TABLE 2
2016–2017 Consolidated Budget By Fund (\$,000)

	Operating	Ancillary Operations	Research	Capital	Special Purpose	TOTAL
Revenue:						
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
Total Revenue	1,096,555	98,284	438,210	146,664	96,890	1,876,603
Expense:						
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
Total Expense	1,094,233	95,816	404,062	151,481	93,390	1,838,982
Excess of Revenue Over Expense	2,322	2,468	34,148	(4,817)	3,500	37,621
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	(4,735)	(2,110)	9,665	(13,059)	-	(10,329)
Unrestricted Net Assets (Deficiency), Beginning of Year	(174,880)	38,571	63,418	13,675	-	(59,216)
Unrestricted Net Assets (Deficiency), End of Year	(179,615)	36,461	73,083	616	-	(69,455)

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
Capital Projects					
Agricultural Research Infrastructure - St Albert / Kinsella / Matheis	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
Total - Projects Underway / Proceeding	862,026		117,282	68,978	1,048,286
Annual Capital Programs:					
Infrastructure Maintenance Program Grant			17,040		
Energy Management			9,000		
Total Annual Capital Programs			26,040		
TOTAL	862,026	+	143,322	+	68,978 = 1,048,286
Future Capital Projects					
	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020
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
Total Future Capital Projects	2,550	52,600	177,000	218,450	148,800
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
Ancillary Services						
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
Net Operations	2,408	780	(1,776)	824	6,458	(9,690)
Reserve Balances, Closing						
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
Total Reserve Balance	25,642	25,542	23,766	24,590	31,048	21,358
Augustana: Residence, Conferencing, and Food						
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
Net Operations	(86)	(285)	(427)	279	297	309
Reserve Balances, Closing						
Operating	1,000	432	940	1,151	1,377	1,612
Capital	3,223	4,572	3,637	3,705	3,776	3,850
Total Reserve Balance	4,223	5,004	4,577	4,856	5,153	5,462
Bookstore						
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
Net Operations	(670)	(873)	(10)	24	(22)	(68)
Reserve Balances, Closing						
Operating	(1,134)	(1,193)	(1,203)	(1,179)	(1,201)	(1,269)
Capital	-	-	-	-	-	-
Total Reserve Balance	(1,134)	(1,193)	(1,203)	(1,179)	(1,201)	(1,269)
University Health Services						
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
Net Operations	30	(463)	103	70	(30)	(67)
Reserve Balances, Closing						
Operating	294	263	366	436	405	339
Capital	200	100	100	100	100	100
Total Reserve Balance	494	363	466	536	505	439
Utilities*						
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
Net Operations	(6,700)	(6,700)	-	-	-	-
Reserve Balances, Closing						
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
Total Reserve Balance	10,449	8,856	8,856	8,856	8,856	8,856
TOTAL						
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
Net Operations	(5,018)	(7,542)	(2,110)	1,197	6,703	(9,516)
Reserve Balances, Closing						
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
Total Reserve Balance	39,675	38,571	36,461	37,658	44,362	34,846

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
REVENUE					
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	\$ 334,376	\$ 343,153	\$ 351,434	\$ 357,556
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	\$ 77,986
	\$ 1,833,083	\$ 1,876,603	\$ 1,891,309	\$ 1,935,480	\$ 1,985,061
EXPENSE					
Learning	\$ 1,101,940	\$ 1,131,998	\$ 1,157,389	\$ 1,196,690	\$ 1,232,048
Research	\$ 470,242	\$ 476,452	\$ 491,459	\$ 508,759	\$ 525,959
Facility operations and maintenance	\$ 139,847	\$ 134,716	\$ 120,090	\$ 119,507	\$ 122,061
Ancillary services	\$ 102,721	\$ 95,816	\$ 96,075	\$ 100,763	\$ 106,013
	\$ 1,814,750	\$ 1,838,982	\$ 1,867,013	\$ 1,925,719	\$ 1,986,081
Excess 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
				-				-
Total FLEs	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.								
	UG	Grad	Total	UG	Grad	Total		
International Enrolment	3,941	2,016	5,957	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
				-				-
Total FLEs	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								
Note: The International enrolment numbers provided here are also included in the overall enrolment numbers provided above.								
	UG	Grad	Total	UG	Grad	Total		
International Enrolment	3,941	2,016	5,957	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)

	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
				-				-
Total FLEs	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								
Note: The International enrolment numbers provided here are also included in the overall enrolment numbers provided above.								
	UG	Grad	Total	UG	Grad	Total		
International Enrolment	3,980	2,016	5,996	4,004	2,016	6,020		
	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
				-
Total FLEs	26,695	3,951	2,768	33,414
	UG	Grad		Total
International Enrolment	4,004	2,016		6,020
	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

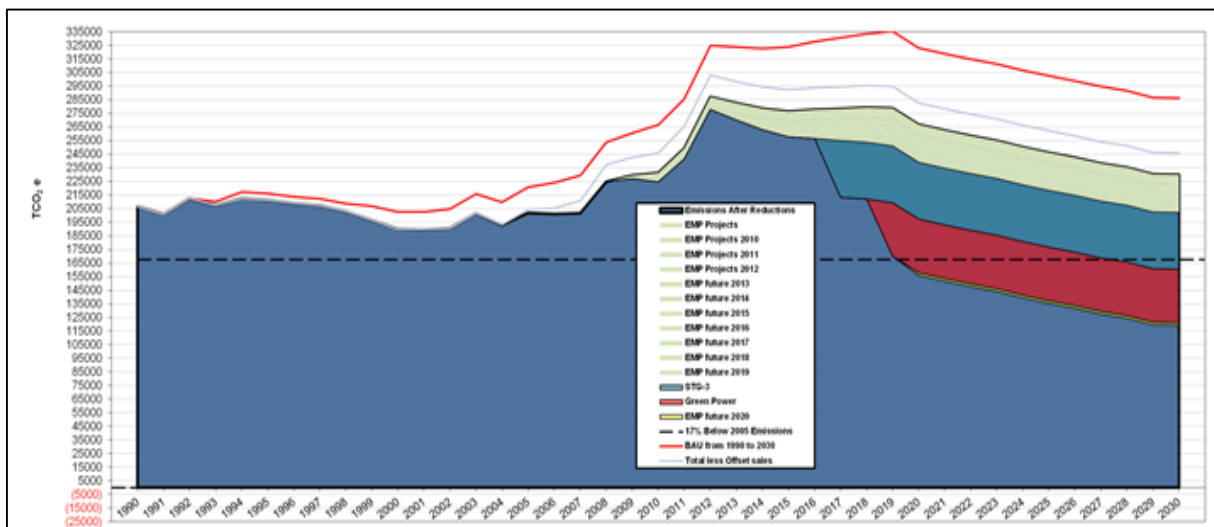
- Provincial and global economies: Currently the key issue affecting new space and corresponding capital is continued economic uncertainty and volatility. The university needs to continue to work with government to develop strategies that maximize and leverage limited government resources.
- Lack of 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 ²)	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 ²)	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.

OUTLINE OF ISSUE

Agenda Title: **Proposal for a (New) Post-Baccalaureate Certificate in Indigenous Sport and Recreation, the Faculty of Graduate Studies and Research and the Faculty of Physical Education and Recreation in partnership with the Faculty of Native Studies**

Motion: THAT the Board Learning and Discovery Committee, acting with delegated authority of the Board of Governors and on the recommendation of the GFC Academic Planning Committee, approve the (new) Post-Baccalaureate Certificate in Indigenous Sport and Recreation, as submitted by the Faculty of Graduate Studies and Research and the Faculty of Physical Education and Recreation in partnership with the Faculty of Native Studies, and as set forth in Attachment 1, for implementation in Fall 2016.

Item

Action Requested	<input checked="" type="checkbox"/> Approval <input type="checkbox"/> Recommendation <input type="checkbox"/> Discussion/Advice <input type="checkbox"/> Information
Proposed by	Steven Dew, Provost and Vice-President (Academic); Heather Zwicker, Dean, Faculty of Graduate Studies and Research; Kerry Mummery, Dean, Faculty of Physical Education and Recreation
Presenter	Steven Dew, Provost and Vice-President (Academic); Kerry Mummery, Dean, Faculty of Physical Education and Recreation
Subject	Proposal for a Post-Baccalaureate Certificate in Indigenous Sport and Recreation

Details

Responsibility	Provost and Vice-President (Academic)
The Purpose of the Proposal is (please be specific)	<p>The focus of the Certificate in Indigenous Sport and Recreation is the health and well-being of Indigenous people through sport and recreation. The intended purpose is to serve a demonstrated need in the realm of community-based Indigenous sport and recreation, establish a deep understanding of the cultural context of Indigenous communities and populations and enhance leadership in the growing field of Indigenous sport and recreation.</p> <p>The program will be delivered in a blended format. The curriculum will consist of 3 online courses valued at 3 credits each (9 credits total), plus participation at a mandatory, one-week, in-class (i.e., face to face) experiential learning experience, completed over 10 months.</p> <p>The certificate is designed around a cohort model. Students will enter the program in September. The certificate requirements will enable students to complete the program with minimal travel and little disruption to their work and family lives. Providing a cohort model and an in class learning experience will allow for a valuable networking opportunity and the ability to share best practices and resources for success with other professionals in the field.</p> <p>The online portion of the program will use both synchronous and asynchronous teaching modalities to create interactive, dynamic, and supportive communities of learning.</p> <p>The goal of this Certificate is to provide students the background and knowledge to provide relevant and high quality recreation opportunities to indigenous populations to increase participation, and increase social and physical well-being.</p>

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The Impact of the Proposal is	<p>The impact on the primary target audience of working professionals, both Aboriginal and non-Aboriginal, will be increasing opportunities to enhance their knowledge in Indigenous Sport and Recreation.</p> <p>The knowledge and experiences gained from this certificate may contribute toward improved programming for Aboriginal population groups, quality of programming and workplace diversity. It will also contribute to professional growth, promotional opportunities, and job security.</p> <p>The in class learning experience will also provide a valuable networking opportunity and the ability to share best practices and resources for success with other professionals in the field.</p>
Replaces/Revises	N/A
Timeline/Implementation Date	Fall 2016
Estimated Cost	Approximately \$8,000.00. This includes tuition fees, off-campus and non-instructional fees, as well as the cost for the mandatory one-week learning experiences (which includes accommodations, meals, and supplies). See Proposal.
Sources of Funding	Cost Recovery/Revenue Generation; Start-Up funds provided by the Office of the Provost
Notes	During consideration by the GFC Academic Standards (ASC) and Academic Planning (APC) Committees, it was noted that the target audience for this certificate is professionals currently working in the field such as recreation specialists, teachers, social workers, and members of police units; as such, the cost of the program was not anticipated to be a barrier to access. The certificate is revenue generating and would not be supported by the Campus Alberta grant. The Faculty is working with the development office in regards to potential scholarships for students.

Alignment/Compliance

Alignment with Guiding Documents	<ol style="list-style-type: none"> 1. In the Comprehensive Institutional Plan (June 2014) the University is committed to delivering “course, certificates, diplomas, degrees, educational experiences and professional apprenticeship opportunities” 2. “Student Experience and Engagement” The University of Alberta’s Academic Plan and Comprehensive Institutional Plan discusses Aboriginal enrolment (P. 37), Enrolment in the North and International Enrolment (P. 39), E-learning pathways (P. 49), and Aboriginal Access, Enrolment and Initiatives. (P. 79) 3. “Providing Diverse and Flexible Credits” The University of Alberta’s Institutional Plan states that the University will provide diverse and flexible credits, that include Post-Baccalaureate Certificates and allowing students early exit points with the opportunity to ladder their credentials. (P. 51) 4. “Programming Trends” The Comprehensive Institutional Plan identifies programming trends including an increased use of e-learning, development and demand for continuing professional development opportunities, an increased demand for course-based master’s programs, and the increased need for post- baccalaureate education for those coming from returning to rural and urban Aboriginal communities. (P. 54)
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Compliance with Legislation, Policy and/or Procedure Relevant to the Proposal (please quote legislation and include identifying section numbers)

1. **Post-Secondary Learning Act (PSLA):** The PSLA gives GFC responsibility, subject to the authority of the Board of Governors, over academic affairs. Further, the PSLA gives the Board of Governors authority over certain admission requirements and rules respecting enrolment. The Board has delegated its authority over admissions requirements and rules respecting enrolment to GFC and the GFC ASC. (Sections 26(1), 60(1)(c) and (d)).

2. **PSLA:** The PSLA gives GFC responsibility, subject to the authority of the Board of Governors, over academic affairs (Section 26(1)) and provides that GFC may make recommendations to the Board of Governors on a number of matters including the budget, academic planning, and related matters (Section 26(1)(o)). GFC has thus established an Academic Planning Committee (GFC APC), as set out in the GFC APC Bylaws.

3. **UAPPOL Admissions Policy:** "Admission to the University of Alberta is based on documented academic criteria established by individual Faculties and approved by GFC. This 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."

4. **UAPPOL Admissions Procedure:**
"PROCEDURE

1. EFFECTIVE DATE OF CHANGES TO ADMISSION REGULATIONS
Following approval by GFC:
 - a. Where changes to admission regulations may disadvantage students in the current admission cycle, normally implementation will be effective after the change has been published in the University Calendar for one full year (i.e., effective the second year that the information is published in the University Calendar).

5. **UAPPOL Academic Standing Policy:** "All current academic standing regulations, including academic standing categories, University graduating standards and requirements for all individual programs will be those prescribed by Faculty Councils and GFC as set forth in the University Calendar."

6. **UAPPOL Academic Standing Regulations Procedures:** "All proposed new academic standing regulations and changes to existing academic standing regulations will be submitted by the Faculties or the

Administration to the Provost and Vice-President (Academic). Faculties will also submit to the Provost and Vice-President (Academic) any proposed changes to the use and/or computation of averages relating to academic standing, including promotion and graduation.

If the Provost and Vice-President (Academic) determines the proposal to be in good order, the proposal will be introduced to the appropriate University governance process(es). In considering these proposals, governance bodies will consult as necessary with the Faculties and with other individuals and offices.

Normally, changes become effective once they are approved by GFC or its delegate and are published in the University Calendar.”

7. GFC Academic Standards Committee (ASC) Terms of Reference (3. Mandate of the Committee):

“G. Certificates (All Faculties): Approval Route

GFC delegated to ASC the authority to approve proposals for the establishment of and termination of credit and non-credit certificates, regardless of the proposing academic unit. Where additional funding and/or space is required to support the offering of the proposed certificate and/or if, in the opinion of the Provost and Vice-President (Academic) (or delegate), the certificate requires Government approval, ASC would provide a recommendation on the (proposed) initiative to the GFC Academic Planning Committee (APC). (GFC 31 MAY 2005) (EXEC 12 JAN 2009)”

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

“8. Establishment/Termination of Academic Programs [...]

d. Where additional funding and/or space is required to support the offering of a proposed certificate and/or if, in the opinion of the Provost and Vice-President (Academic) the certificate required Government approval, ASC would provide a recommendation on the (proposed) initiative to APC. APC, in turn, would have the GFC delegated authority to give final approval for the proposal in those cases where Government approval of the certificate is not required; in cases where Government approval is required, APC would provide recommendation on the proposal to the Board of Governors (or delegate body). (GFC 31 MAY 2005).”

9. 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.

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	<p>Without limiting the generality of the foregoing the Committee shall: [...]</p> <p>c. review and approve recommendations of GFC for major changes in instructional and research programs and other academic matters[.] [....]"</p> <p>Cost-recovery proposals are to be reviewed by the Registrar’s Advisory Committee on Fees (RACF), with any recommendation on the cost recovery component of the proposal to be forwarded to the Provost and Vice-President (Academic) for final approval.</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"> • Those who have been informed • Those who have been consulted • Those who are actively participating 	<p>Brenda Leskiw, Chair of GFC Academic Standards Committee (discussion and recommendations) -November 2014</p> <p>Kathleen Brough, Senior Administrative Officer (discussion and recommendations) - November 2014, February 2015</p> <p>Mazi Shirvani, Dean Faculty of Graduate Studies and Recreation (FGSR)(discussion and recommendations) - March 2015</p> <p>Ada Ness, Registrar’s Office (discussion and recommendations) - April 2015</p> <p>Donna Goodwin, Faculty of Physical Education and Recreation (discussion and recommendations) - August 2015</p> <p>Janice Causgrove-Dunn, GFC Academic Standards Vice-Chair, (discussion and recommendations) - August 2015</p> <p>Nat Kav, Vice-Provost Academic & GFC Academic Standards Chair (discussion and recommendations) -September 2015</p> <p>Edith Finczak, Office of the Provost (discussion and recommendations on fees) - September 2015</p> <p>Tom Hidson, Assistant Registrar (discussion and recommendations on fees and fee structure) - September 2015</p> <p>Kate Peters, Portfolio Initiatives Manager, Provost’s Office (discussion and recommendations) - September, October 2015</p> <p>Janice Hurlburt FGSR (discussion and recommendations) – October 2015</p> <p>Mary Sturgeon, FGSR (discussion and recommendations) – October 2015</p> <p>This was presented at the Registrar’s Advisory Committee on Fees (RACF) on November 24, 2015 for recommendation on the cost recovery component of the proposal to be forwarded to the Provost and Vice-President (Academic) for final approval.</p>
<p>Approval Route (Governance) (including meeting dates)</p>	<p>Faculty Council Physical Education and Recreation – Sept. 23, 2015</p> <p>Faculty Council Native Studies – October 23, 2015</p> <p>Faculty Council Graduate Studies and Research – October 21, 2015</p> <p>GFC Academic Standards Subcommittee on Standards – Nov. 5, 2015</p> <p>GFC Academic Standards Committee – November 19, 2015</p> <p>GFC Academic Planning Committee - Dec 9, 2015 - for recommendation</p> <p>Board Learning and Discovery Committee – Feb 29, 2016 – for approval</p>
<p>Final Approver</p>	<p>Board Learning and Discovery Committee</p>

Attachments:

1. Proposal Template for Post-Baccalaureate Certificate in Indigenous Sport and Recreation with appendices and calendar copy (287 pages)

Proposal Template Diploma, Certificate and Non-credential Programs

The following template outlines the information required by Enterprise and Advanced Education to support its comprehensive review of proposals for new certificate, diploma and non-credential programs and new specializations in existing certificate, diploma and non-credential programs.

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

Basic Information

Institution	University of Alberta
Program/specialization title	Indigenous Sport and Recreation Certificate
Credential awarded	Certificate
Proposed Implementation Date	September 2016

SECTION 1: PROGRAM OVERVIEW

1.1 Type of Initiative

The Certificate in Indigenous Sport and Recreation is a Post-Baccalaureate Certificate offered in partnership with the Faculty of Native Studies and the Faculty of Physical Education and Recreation.

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 focus of the Certificate in Indigenous Sport and Recreation is the health and well-being of Indigenous people through sport and recreation. The intended purpose is to serve a demonstrated need in the realm of community-based Indigenous sport and recreation, establish a deep understanding of the cultural context of Indigenous communities and populations and enhance leadership in the growing field of Indigenous sport and recreation.

The program will be delivered in a blended format. The curriculum will consist of 3 online courses valued at 3 credits each (9 credits total), plus participation at a mandatory, one-week, in-class (i.e., face to face) experiential learning experience, completed over 10 months. This could include participation at the annual Alberta Recreation and Parks Association (ARPA) Conference.

The certificate is designed around a cohort model. Students will enter the program in September. The certificate requirements will enable students to complete the program with minimal travel and little disruption to their work and family lives.

The online portion of the program will use both synchronous and asynchronous teaching modalities to create interactive, dynamic, and supportive communities of learning.

Students must successfully pass all required components to receive their certificate. However, under extenuating circumstances **one** “option in case of incomplete” (eg. assignment, paper,) will be granted. Incompletes will be handled case-by- case by the office of the Assistant Dean, International and Community Education and the office of the Associate Dean, Graduate.

Courses to be developed include:

1. **Indigeneity and Settler Colonialism:** This introductory course will cover an outline of historical and contemporary issues relevant to Indigenous peoples in settler/colonial states. Students will critically understand political, social and historical relationships between Indigenous and non-Indigenous peoples in settler/colonial States. Engagement with Indigenous knowledge and belief frameworks will be central to the course materials. (3 credits)
2. **Managing Recreation, Sport, and Physical Activity Programs in Indigenous Communities:** In this second course, students will acquire a strong knowledge of management concepts in sport, recreation, and physical activity. Students will gain an understanding of the application of management knowledge in Indigenous communities as well the development of funding models germane to delivering programs in Indigenous communities. (3 credits)
3. **Indigenous Peoples’ Physical Activity:** The third and final course will describe the historical and contemporary roles of physical activity and sport (sport, recreation and leisure practices) in the lives of Indigenous people. Course content will include the potential role of physical activity in the promotion of Indigenous peoples’ holistic health as well as critique the conceptual and theoretical frameworks used to understand and promote physical activity. (3 credits)

1.3 Enrolment Plan

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

The 10-month certificate will be offered on a part-time basis with registrations accepted each September. The students will complete three courses and the one-week in class session in sequence, completing their certificate as an intact cohort.

Based on the design of this program, a low attrition rate is expected (eg. 1-3 students per intake of an anticipated enrollment of approximately 12 in the first intake). Attrition is not expected to impact certificate offerings as the target audiences are distinct (undergraduate vs. graduate, on-campus vs. off-campus).

Proposed Enrolment	Year 1	Year 2	Year 3	Year 4	Year 5	Annual Ongoing
Total head count	12	15	20	25	30	35
• Full-Time Year 1	0	0	0	0	0	0
• Full-Time Year 2	0	0	0	0	0	0
• Full-Time Year 3	0	0	0	0	0	0
• Full-Time Year 4	0	0	0	0	0	0
Total FLE	0	0	0	0	0	0
• FLE Year 1	0	0	0	0	0	0
• FLE Year 2	0	0	0	0	0	0
• FLE Year 3	0	0	0	0	0	0
• FLE Year 4	0	0	0	0	0	0
Anticipated No. of Graduates	10	19	23	27	32	32

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 results of a survey completed by the Alberta Parks and Recreation Association (ARPA) in June, 2013 indicated there is a clear interest and need for accessible learning “Delivery should be accessible to as wide a group as possible”, (p. 10 of Appendix I). Further, the need for accessible communities supports our cohort model of learning. (CPRA Association Attitudes towards a National Model of Professional Development, Appendix I).

There are no similar programs to our knowledge offered at other institutions beyond the embedded undergraduate certificate (Aboriginal Sport and Recreation) that is currently being offered jointly in the faculties of Physical Education & Recreation and Native Studies at the University of Alberta. The Indigenous Sport and Recreation Post-Baccalaureate is a separate (new) program. There are currently 14 students enrolled in the embedded certificate indicating a clear interest in this area of study. Since the initial enrollment of eight students in 2011, numbers have consistently been 14- 20 students per year. Feedback expressed during the focus group held in May of 2015, indicated a desire for advanced graduate level content and that is accessible to those working full-time.

Further, the Alberta Recreation and Parks Association did a market analysis survey of professional leadership opportunities in 2013. An outcome of the survey was an expressed interest in graduate level, part time, blended learning professional development education. “Respondents also engaged in professional development through other avenues such as: their employer, workshops, post-secondary education, and professional certificates”. (Appendix II, p. 6). (Alberta Recreation and Parks Association Member Survey Summary, Appendix II).

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.

The primary target audience is working professionals, both Aboriginal and non-Aboriginal, looking for an opportunity to enhance their knowledge in Indigenous Sport and Recreation. Knowledge and experiences gained from this certificate may contribute toward professional growth, promotional opportunities, job security, and improved programming for Aboriginal population groups, and workplace diversity.

There are an estimated 6,000 registered Recreation Professionals across Canada. In May 2005, the Alberta Recreation and Parks Association conducted a labour market analysis indicating a need for “enhanced programming, education, more programs and better access needed for professional development”. (Alberta Recreation Industry Labour Market Analysis, Appendix III, p. 2).

In addition, there are approximately 222,000 Aboriginal people in Alberta (2011 National Household Survey. Appendix IV, p. 6).

Moreover, according to McHugh, Holt & Anderson (2015, p. 219), "The Indigenous population is the fastest growing segment of the Canadian population (Statistics Canada, 2011). The Indigenous population is also very young, with 28% of the total Indigenous population in Canada under the age of 15 years, compared to 16.5% of the total non-Indigenous population (Statistics Canada, 2011). Indigenous peoples in Canada experience a disproportionate burden of health disparities, and sport and recreation may serve as one avenue for addressing the health of this young and growing population" (McHugh, T., Holt, N., & Anderson, C. 2015).

Based on the above demographics, a post-baccalaureate certificate in Indigenous Sport and Recreation will enhance the skill set for Aboriginal people and non-Aboriginal people working in recreation. It will also increase the knowledge of better health, health promotion, and active living. This knowledge may increase job opportunities and possibilities for promotion in the areas of municipalities, teachers, recreation professionals, recreation and physical therapists, health professionals (specifically in rural and reserve areas), members of the RCMP, and other allied professionals.

In summary, *"Two of the largest issues with recreation on reserves is maintaining our ageing recreation facilities and finding the qualified staff to work in them."*
Colleen, Maskwacis
Coach, organizer, community builder, and board member of various provincial Aboriginal organizations ("Supporting Alberta Indigenous Youth Health Programs: A Gathering of Community Programmers")

Training and retaining quality staff is a growing challenge in rural Alberta, but is an even larger challenge in Aboriginal communities. *"Equipping Aboriginal people and communities with the education, knowledge, ability, and technology to increase their participation in the workforce and economy is critical to their future and Alberta's future productivity and competitiveness."*
(Appendix IX: *Connecting the Dots: Aboriginal Workforce and Economic Development in Alberta*).

2.3 Support

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

A strong consultative process both internal and external to the University of Alberta was undertaken.

2.3.1 The consultative process within the University of Alberta included consultation with a multi-faculty Advisory Committee which included faculty and staff members from both Native Studies and Physical Education & Recreation. The Registrar's office, the Admissions office, the Faculty of Rehab Medicine (who have previously created similar revenue generating certificates), the Faculty of Graduate Studies, and the Provost Office were also consulted.

2.3.2 A focus group was conducted in May of 2015 consisting of professionals in the areas of Recreation and Indigenous Communities including Alberta Recreation and Parks, YMCA, Government of NWT & Yukon, Alberta Future Leaders, and the Faculties of Native Studies and Faculty of Physical Education Recreation. The group received information on post-baccalaureate certificates, blended learning environments, opportunities for

professional development, funding, timelines and other areas related to the certificate. They also completed a surveyed of follow up questions. (Appendix V: Focus Group Executive Summary)

2.3.3 A three page survey was developed and distributed to Recreation Professionals across Canada including The Alberta Recreation and Parks Association, the Centennial Community and Recreation Association, and the Canadian Intramural & Recreation Association. A summary of the results from 24 participants follows, (Appendix VI: Survey Results):

- 100% of participants are interested in going back to post-secondary to further their education or enhance their professional development.
- 72% indicated they would like to take something at a graduate level
- 87% surveyed hold an undergraduate degree
- 75% indicated time was the biggest factor they hadn't pursued it so far, 72% indicated financial resources as the reason and 23% was due to family commitments
- 97% felt that shorter, more condensed courses as we have structured in this certificate would be more appealing to them as a full-time employee
- 87% supported a mandatory one-week intensive component
- 74% agree with the proposed
- 87% found online learning appealing
- 95% support life-experience provisions for acceptance in the absence of an undergraduate degree
- 82% find the laddering option into a course-based master's degree more appealing
- 61% have access to professional development funding
- Of that, 63% indicated this type of certificate would be eligible to receive that funding
- 65% said they would use available funding towards a program such as this
- 64% felt the tuition and fees for this certificate (approx. \$6800) was good value
- 73% indicated that a cohort model was appealing
- 73% also indicating that a cohort model will support successful
- 68% indicated this specific area of study interests them
- 73% said they would be interested in taking this certificate
- 85% know of someone who may be interested in taking this certificate as well
- 89% of employers would support staff registration in the certificate
- 83% were currently working in recreation
- 66% were currently work with an Aboriginal group

2.3.4 Letters of support from the Canadian Parks and Recreation Association and the Alberta Recreation and Parks Association are provided. (Appendix VII: Letter of Support, CPRA). (Appendix VIII: Letter of Support, ARPA).

2.3.5 At a recent two-day research meeting, Supporting Alberta Indigenous Youth Health Programs Through Recreation, the following quotations were recorded. (Edmonton, AB, July 2015).

"I want to grow old and become an elder. In order for me to do this, I need to make sure the youth and young professionals in my community not only stay in Calling Lake but have the skills to carry the torch."

Angela, Calling Lake

Municipal Staff - Recreation

(ACE Communities, Active Communities Strategies, and Communities ChooseWell Leader)

"Who will take care of all of this when I am gone? It is a tragedy that we don't have enough professional talent on reserve to look after all of these facilities that we are constantly building."

Ira, Siksika

Facilities Manager

(ARPA Aboriginal Recreation Directors Summit)

2.3.6 The proposed certificate would support the recommendations of the The Truth and Reconciliation Commission Report which speaks directly to sport, education, and leadership. The relevant recommendations are below.

(http://www.trc.ca/websites/trcinstitution/File/2015/Findings/Calls_to_Action_English2.pdf):

87. We call upon all levels of government, in collaboration with Aboriginal peoples, sports halls of fame, and other relevant organizations, to provide public education that tells the national story of Aboriginal athletes in history.

88. We call upon all levels of government to take action to ensure long-term Aboriginal athlete development and growth, and continued support for the North American Indigenous Games, including funding to host the games and for provincial and territorial team preparation and travel.

89. We call upon the federal government to amend the Physical Activity and Sport Act to support reconciliation by ensuring that policies to promote physical activity as a fundamental element of health and well-being, reduce barriers to sports participation, increase the pursuit of excellence in sport, and build capacity in the Canadian sport system, are inclusive of Aboriginal peoples.

90. We call upon the federal government to ensure that national sports policies, programs, and initiatives are inclusive of Aboriginal peoples, including, but not limited to, establishing:

- In collaboration with provincial and territorial governments, stable funding for, and access to, community sports programs that reflect the diverse cultures and traditional sporting activities of Aboriginal peoples.
- An elite athlete development program for Aboriginal athletes.
- Programs for coaches, trainers, and sports officials that are culturally relevant for Aboriginal peoples.
- Anti-racism awareness and training programs.

91. We call upon the officials and host countries of international sporting events such as the Olympics, Pan Am, and Commonwealth games to ensure that Indigenous peoples' territorial protocols are respected, and local Indigenous communities are engaged in all aspects of planning and participating in such events.

2.3.7 The proposed certificate supports Premier Notley's mandate and help to build better pathways to Indigenous People. In July of 2015, Premier Notley wrote a mandate letter to the Cabinet Ministers of Alberta regarding her commitment to "renewing and improving our relationship with Indigenous Peoples". She also speaks about education for Indigenous peoples and continuing to chart a path forward together with Indigenous people. (Appendix X: Premier Notley's Mandate Letter).

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.

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 Post Baccalaureate Certificate in Indigenous Sport and Recreation aligns with the University of Alberta in the following areas:

3.1.1 University of Alberta's Academic Plan and Comprehensive Institutional Plan in the following ways: Aboriginal enrolment (p. 37), Enrolment in the North & International enrolment (p. 39), E-learning (p. 49), Aboriginal Access, Enrolment, & Initiatives, p. 79).

3.1.2 The certificate program aligns with the Institutional Plan for providing diverse and flexible credits (p. 46, 2014/15 Institutional Plan:
http://www.provost.ualberta.ca/en/~media/provost/Documents/2015_UAlberta_CIP_FINAL.pdf)

3.1.3 The certificate aligns with programming innovations and initiatives outlined in the Comprehensive Institutional Plan, notably providing diverse and flexible credentials – this certificate may provide the ability to ladder to a course based Master's degree or it can stand alone as a certificate (p. 46, 2014/15 Institutional Plan:
http://www.provost.ualberta.ca/en/~media/provost/Documents/2015_UAlberta_CIP_FINAL.pdf)

3.1.4 The certificate also addresses programming trends identified in the Institutional Plan including an increased use of e-learning, development and demand for continuing professional development opportunities, an increased demand for course-based master's programs, and the increased need for post baccalaureate education for those coming from or returning to rural and urban Aboriginal communities (p. 45, 2014/15 Institutional Plan:
http://www.provost.ualberta.ca/en/~media/provost/Documents/2015_UAlberta_CIP_FINAL.pdf)

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 Faculties of Physical Education and Recreation and Native Studies currently offer an embedded undergraduate certificate in Indigenous Sport and Recreation. The embedded certificate benefits students by offering an enhanced and focused learning opportunity leading to a better understanding of the cultural context of sport and recreation for Aboriginal People. The proposed free-standing graduate level certificate will provide graduate level content to practitioners in the field.

3.3 Internal Review and Approval

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

The consultative process stakeholders include University of Alberta and community members.
(See section 2.3).

Consultative Steps:

1. Advisory Committee: members from the Faculties of Physical Education and Recreation and Native Studies,
Provided oversight for setting cohort learning model, program sequencing, entrance requirements, credit units, tuition costs and other logistical details.
2. Curriculum Content Committee: members from the Faculties of Physical Education and Recreation and Native Studies.
Will provide oversight for the development of course content and delivery through an online classroom.
3. Faculty of Graduate Studies and Research:
Consulted on proposal details, cohort model, one-week intensive, credit allotment, cost, timelines, and seeking approval to move forward for approval, expected October, 2015.
4. Faculty of Physical Education and Recreation:
Approved by Faculty Executive Committee on September 10, 2015 to Faculty Council for approval.
Approved by Faculty Council on September 23, 2015.
5. Faculty of Native Studies
Seeking approval from Academic Affairs to move forward to Faculty Council for approval.
Academic Affairs Committee on October 2, 2015.
6. Office of the Registrar:
Consulted on admission requirements and tuition.
7. Attended the “Supporting Alberta Aboriginal Youth Health Programs Gathering”

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.

The proposed certificate is unique in that it will provide ongoing professional development to those working to promote physical activity and the health and well-being of Indigenous peoples. Examples include Education, Health Sciences, Arts, ALES.. Students may ladder the credits earned in this Certificate to a course-based Master’s degree at the University of Alberta should they wish to pursue further graduate credentials.

Because the graduate certificate is distinct from anything currently available, we do not anticipate there will be competition for enrollment.

The proposed certificate will fill a gap in current educational offerings by providing knowledge specific to Indigenous Sport and Recreation. In addition to domestic interest, we anticipate potential interest from other countries with Indigenous people (e.g. Australia, New Zealand, USA, etc.). The certificate will provide valuable professional development for recreation professionals along with a number of other disciplines working across the country and globally. This certificate provides an opportunity to gain specific skills and knowledge in this unique and specialized area of study.

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.

An internet search revealed there are currently no other programs of the kind proposed. The certificate is unique in: content, a blended learning format, the cohort model of learning, and the intensive one-week learning experience.

External consultations were held with:

1. Alberta Recreation and Parks Association
Consulted on Professional Development for Recreation professionals and the demand for more professional development in this specific area.
2. Canadian Parks and Recreation Association
Consulted on a form of PLAR for admission and partnership for the National PD Certification program.
3. Focus Group
Administered to seek feedback and support for more education in this area and program details.
4. Survey
Conducted to seek out the need for more education and awareness in this area.

3.6 Learner Pathways

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

Not applicable.

- 1.1.2. 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.*

Current policy allows a portion of the credits earned after successful completion of the certificate, may be transferred into a Course-based Master's Degree. "**Course-based programs:** The number of courses nearest to, but not exceeding, 1/3 of the total units of course weight of a student's program can be met through transfer credit and/or course exemption if recommended by the department and approved by the Faculty of Graduate Studies and Research on a case-by-case basis.

In exceptional circumstances and with the explicit prior approval of the Faculty of Graduate Studies and Research, up to 1/2 of the total units of course weight for the program may be met through transfer credit and/or course exemption" (Section 203.5 in the 2015-2016 University Calendar).

The certificate may ladder towards a course based master's degree in Recreation and Leisure Studies. Students who successfully complete the certificate may complete two additional certificates offered in a similar area of study and a capping project to complete a course based master's degree.

- 1.1.3. 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?*

We anticipate that the option to complete the certificate only or subsequently ladder the certificate toward a course based Master's Degree will make this program appealing to a larger target audience including working professionals. "...increased demand for course-based master's programming, especially directed at professional development" (University of Alberta Institutional Plan, page 54).

SECTION 4: FINANCIAL VIABILITY AND SUSTAINABILITY

4.1 Annual Budget and Funding Sources

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
Revenue						
Tuition and Related Fees	\$69504.00	\$86880.00	\$115840.00	\$144800.00	\$173760.00	\$202720.00
Re-allocation from Existing Programs ¹	\$0	\$0	\$0	\$0	\$0	\$0
Other Internal Sources ²	\$0	\$0	\$0	\$0	\$0	\$0
External (Third Party) Sources ³	\$0	\$0	\$0	\$0	\$0	\$0
GOA (Identify source) ⁴	\$0	\$0	\$0	\$0	\$0	\$0
Other (specify)	\$0	\$0	\$0	\$0	\$0	\$0
Total Revenue	\$69504.00	\$86880.00	\$115840.00	\$144800.00	\$173760.00	\$202720.00
Operational Costs						
Salaries, Wages and Benefits	\$62668.00	\$63516.00	\$64390.00	\$65290.00	\$66217.00	\$67171.00
Materials and Contracted Services	\$9700.00	\$9700.00	\$9700.00	\$9700.00	\$9700.00	\$9700.00
Other Direct Costs	\$17484.00	\$21855.00	\$29140.00	\$36425.00	\$43710.00	\$50995.00
Indirect Costs	\$0	\$0	\$0	\$0	\$0	\$0
Total Operational Costs	\$89852.00	\$95071.00	\$103230.00	\$111415.00	\$119627.00	\$127866.00

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.

One-time expenditures	Amount	Revenue Source	Details
Facilities	\$		
Equipment and IT	\$10000	Start Up funds	Provided by the Office of the Provost
Curriculum Development	\$18000	Start Up funds	Provided by the Office of the Provost
Marketing and Promotion	\$5000	Start Up Funds	Provided by the Office of the Provost
Faculty Recruitment and Establishment	\$		
Library Enhancements	\$		
Other	\$150,000	Start Up Funds	Provided by the Office of the Provost

4.2 Impact

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

This certificate is a revenue generating initiative. The tuition rates are within the range for similar programs offered across Canada and are within the University guidelines for revenue generation (<http://www.registraroffice.ualberta.ca/en/Costs-Tuition-Fees/Other-Fees/Cost-Recovery-Programs-and-Courses.aspx>). They are also on par with other certificate programs offered at the University of Alberta and Campus Alberta and within the parameters of what the market will bear for this target audience.

Tuition and fees for this program are currently set at \$7,992.00 which includes tuition for 3 courses, off-campus and non-instructional fees and the estimated costs of attending the in-class portion including accommodations and meals, the Alberta Recreation and Parks Association conference registration fees, and administrative and IT costs.

1.1.2. 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.

The financial impact on students will be minimal based on professional development funds available as well as scholarship opportunities and support from local Band Councils. One of the primary target audiences is working professionals, most of whom will have access to professional development funds. This will fit in nicely within the CPRA National Professional Development certification requirements which will not add any further expense to the program but be complementary (see Appendix XI; National Professional Development Certification Program: <http://cprapdc.ca/>).

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

Not applicable.

SECTION 5: QUALITY ASSESSMENT

5.1 Institutional Capacity

5.1.1 List instructional positions that would support the proposed program, specifying position title, credential and experience requirements, and areas of expertise. Distinguish between new and existing positions; and regular and sessional appointments. Describe mechanisms (existing and planned) to develop and ensure currency of teaching skills and disciplinary expertise

5.1.1.2 Current:

-faculty members from both Physical Education and Recreation and Native Studies will oversee the content development, delivery format, and evaluation. Course delivery may be done in combination with existing faculty and sessional instructors.

-Associate Dean Graduate will provide oversight for all FGSR policies and regulations

- Faculty IT position who will support this certificate as well as other IT staff support needs specific to online courses.
- Graduate Administrator who will support the application and admissions processes.
- Assistant Dean, Community and International Education will oversee the administrative roles associated with this and other certificates.

5.1.1.3 New:

- Manager, Community Education (new), will oversee the administrative duties associated with this certificate including student communication.

5.1.2 List instructional support positions (e.g. lab technicians, tutors) related to the proposed program.

Manager, Community Education

5.1.3 Describe facilities, equipment and information resources (existing and planned) that would house and support delivery of the proposed program.

There will be requirements for IT resources, computer technology support for the instructor, if required, and administrative duties regarding marketing, promotion, and communication.

5.1.4 Discuss the anticipated impacts of the proposed program on student support services.

Prospective students and students enrolled in the certificate program will receive support from the Manager, Community Education. There will be an admissions committee developed with members from both Physical Education and Recreation and Native Studies along with the Manager, Community Education to handle “special case” admissions (i.e., students applying with life experience, PLAR). The Manager, Community Education will handle all student related inquiries and issues with support from the Assistant Dean, International and Community Education, the Associate Dean, Graduate Program’s Office and the Faculty of Graduate Studies and Research when required.

5.2 Curriculum

Describe the process of development and validation of curriculum for the proposed program. If available, please attach external review documents.

The curriculum will be developed as an extension of the embedded certificate. The courses will be developed by faculty members and content expert researchers from the faculties of Physical Education and Recreation and Native Studies at the University of Alberta. Assistance will be provided from the content oversight committee and support from the Centre for Teaching and Learning at the University of Alberta when transferring the content to blended format.

5.3 Academic Standards

List the requirements for admission and any alternate routes to admission; for residency; for academic progression; and for graduation. Compare these requirements to those for similar programs.

Requirements for admission will include an undergraduate degree along with a minimum of 2 years of relevant work experience. Prospective students may come from a variety of undergraduate degree programs and some

experience working with either Aboriginal populations or in a recreational setting or some combination of both will be important to a student's success in the certificate program. Applicants who do not hold an undergraduate degree but have considerable relevant work and life achievement experience **may** also be admissible. There will be no other routes in which admission will be granted. There is no residency requirement. There may be an opportunity for academic advancement by laddering the certificate to a course based master's in Recreation and Leisure Studies. Academic standing will follow the Faculty of Graduate Studies and Research requirement which is a minimum grade point average of 2.7 out of 4.0, or a C+ standing. Requirements for graduation are successful completion of all course requirements and attendance at the non-credit, mandatory intensive learning activity.

5.4 Learning Outcomes

5.4.1 Summarize the learning outcomes of the proposed program (e.g. career-specific knowledge and skills, employability skills).

Upon successful completion of the course, students will be able to:

1. Engage with Indigenous epistemological frameworks in order to analyze issues from an Indigenous approach.
2. Outline historical and contemporary issues relevant to Indigenous peoples in settler/colonial states.
3. Identify the political, social and historical relationships and intergenerational impacts between Indigenous and non-Indigenous peoples in settler/colonial states.
4. Explain the ways in which contemporary Indigenous peoples decolonize themselves from the effects of colonialism through sport and recreation.
5. Identify and discuss the key policies that influence recreation, sport and physical activity programs in Indigenous Communities
6. Critique and compare conceptual and theoretical frameworks for community and policy development as they relate to recreation, sport and physical activity programs in Indigenous Communities
7. Put forward a proposal for addressing current issues and trends in recreation, sport and physical activity programs and engage Indigenous Communities
8. Describe the historical and contemporary roles of physical activity, including sport and recreation, in the lives of Indigenous peoples
9. Examine the potential role of physical activity in the promotion of Indigenous peoples' holistic health
10. Critique conceptual and theoretical frameworks used to understand and promote the physical activity of Indigenous peoples

(Appendix XII; full calendar description and learning outcomes).

5.4.2 Describe the consultative process with employers, industry/professional bodies or advisory groups that helped formulate these learning outcomes.

The content oversight committee formulated the above outcomes based on industry need and results from survey and focus group information.

5.4.3 Provide evidence of alignment/compliance with regulatory, industry, program accreditation and professional accreditation standards relevant to the program.

This certificate aligns with the new CPRA Professional Development Certification (CPRA PDC). A letter of

support appears in Appendix VII. Working in the recreation and parks sector requires a unique and diverse set of knowledge, skills and attitudes. The certificate fosters the continual growth of these competencies through accessible professional development, contributing to the creation of a national standard that will strengthen the credibility and quality of its professionals. The proposed certificate will be offered in part with this program. (Appendix XIII; Letter of support from Dr. Kerry Mummery, Dean Faculty of Physical Education and Recreation).

5.5 Institutional Quality Assurance

5.5.1 Describe the criteria and methods for evaluating the success of the program and achieving continuous quality improvement. Include expected outcomes, key performance indicators and performance targets for the program.

A student survey will be conducted at the completion of each course. It will address the program, instruction and instructors, IT support, one-week intensive, and all other aspects of this certificate. Students will be followed in 3 years to assess the impact of the certificate of their employment opportunities, career advancement and impact on their communities. Rate of completion, attrition, and withdraws will be monitored. An “exit” interview will be conducted with those who do not complete. An annual report to the Advisory Committee will also be completed year over year.

5.5.2 Indicate whether a program advisory committee is planned or in place and, if so, comment on the role of the committee in program quality assurance.

An Advisory Committee has been in place since the initiation of this program. The role of this committee has been to offer support and guidance throughout the process of planning and implementation of this new program. They have offered input and feedback throughout the process and have been integral in the proposal presented.

This includes recommendations on the cohort model, the terms of the courses, the amount of credits, the number of weeks, the one-week intensive non-credit, mandatory component, the course content, and the overall framework of the Certificate.

An Admission Committee will be struck with representatives from the Faculty of Physical Education and Recreation and the Faculty of Native Studies. The role of this committee will be to review applicants and make recommendations for admission, specifically those applicants who are eligible for life experience (i.e. applicant does not hold an undergraduate degree but has 10 years of advanced related experience).

Current	Proposed
<p>205.59 Physical Education and Recreation</p> <p>205.59.7 Graduate Courses</p> <p>Graduate courses can be found in §231, Course Listing, under the following headings:- Physical Education and Sport (PEDS) Physical Education, Recreation and Leisure Studies (PERLS) Recreation and Leisure Studies (RLS)</p> <p>[NEW]</p>	<p>205.59 Physical Education and Recreation</p> <p>205.59.7 Certificates</p> <p><u>205.59.7.1 The Post-Baccalaureate Certificate in Indigenous Sport and Recreation</u></p> <p><u>The Certificate in Indigenous Sport and Recreation is a Post-Baccalaureate Certificate offered in partnership between the Faculty of Native Studies and the Faculty of Physical Education and Recreation. The focus of this certificate is the health and well-being of Indigenous people through sport and recreation. The intended purpose is to serve a demonstrated need in the realm of community-based Indigenous sport and recreation, establish a deep understanding of the cultural context of Indigenous communities and populations and to enhance leadership in the growing field of Indigenous sport and recreation. The program will be delivered in a blended format. Specifically, the curriculum will consist of 3 courses valued at 3 credits each (9 credits total), plus participation at a mandatory, one-week, in-class (i.e. face to face) experiential learning experience. This 10-month certificate is designed around a cohort model so students will work together in this innovative, blended program that can be completed with minimal travel and little disruption to their work and family lives. The online portion of the program will use both synchronous and asynchronous teaching modalities to create interactive, dynamic, and supportive communities of learning whose members will become integral participants in this specific program researching Indigenous Peoples and Recreation best practices.</u></p> <p><u>Entrance Requirements</u></p> <p>The requirements for admission will include a</p>

Baccalaureate degree along with a minimum of 2 years of professional experience. Applicants who do not hold a baccalaureate degree but have considerable relevant professional experience may also be admissible. Individuals who feel that this situation applies to them are encouraged to contact admissions to discuss their status. There will be no other routes in which admission will be granted. There will be no opportunity for a residency.

(<https://uofa.ualberta.ca/graduate-studies/prospective-students/canadian-admissions-protocol/academic-requirements>)

Program Requirements

The post-baccalaureate certificate will be granted upon successful completion of the three required courses: PERLS 5XX (3), PERLS 5XX (3), & PERLS 5XX (3) and attendance at the non-credit, mandatory intensive week.

205.59.8 Graduate Courses

Graduate courses can be found in §231, Course Listing, under the following headings:

Physical Education and Sport (PEDS)

Physical Education, Recreation and Leisure Studies-(PERLS)

Recreation and Leisure Studies (RLS)

Justification:

New Courses:

PERLS 5XX Indigeneity and Settler Colonialism (3) This course will explore and critically examine the social issues to gain an understanding of the historical and contemporary relationship between Indigenous and settler societies. Specifically, this course endeavors to investigate how Canada's brand of colonialism has impacted Indigenous collectivities both historically and today.

PERLS 5XX Managing Recreation, Sport, and Physical Activity Programs in Indigenous Communities (3) This course will examine the policies, politics, perceptions and practices related to managing recreation, sport and physical activity programs that occur in or engage indigenous communities. While a global context will be considered, the experience of Indigenous people in Canada will be central to this course. Attention will be given to applying different community and policy development theories to current issues and trends.

PERLS 5XX Indigenous Peoples' Physical Activity (3) This course will examine the role of physical activity in the lives of Indigenous peoples. While global contexts will be considered, the experiences of Indigenous peoples in Canada will be the focus of the course. The manner in which colonization continues to shape the physical activity of Indigenous peoples will be examined and frameworks for the potential promotion of physical activity will be considered.

RECOMMENDATION (FOR DEPARTMENT USE)

Do Any Issues or Information Gaps Remain?

Recommendation(s)

Reviewer(s)

Date Completed

October 8, 2015

2016-2017 University of Alberta Calendar Graduate Program Changes: new Post-Baccalaureate Certificate in Indigenous Sport and Recreation in the Faculty of Physical Education and Recreation in partnership with the Faculty of Native Studies.

Current	Proposed
<p>205.59 Physical Education and Recreation</p> <p>205.59.7 Graduate Courses Graduate courses can be found in §231, Course Listing, under the following headings:- Physical Education and Sport (PEDS)- Physical Education, Recreation and Leisure Studies (PERLS)- Recreation and Leisure Studies (RLS)-</p> <p>[NEW]</p>	<p>205.59 Physical Education and Recreation</p> <p>205.59.7 Certificates</p> <p>205.59.7.1 The Post-Baccalaureate Certificate in Indigenous Sport and Recreation</p> <p>The Certificate in Indigenous Sport and Recreation is a Post-Baccalaureate Certificate offered in partnership between the Faculty of Native Studies and the Faculty of Physical Education and Recreation. The focus of this certificate is the health and well-being of Indigenous people through sport and recreation. The intended purpose is to serve a demonstrated need in the realm of community-based Indigenous sport and recreation, establish a deep understanding of the cultural context of Indigenous communities and populations and to enhance leadership in the growing field of Indigenous sport and recreation. The program will be delivered in a blended format. Specifically, the curriculum will consist of 3 courses valued at 3 credits each (9 credits total), plus participation at a mandatory, one-week, in-class (i.e. face to face) experiential learning experience. This 10-month certificate is designed around a cohort model so students will work together in this innovative, blended</p>

program that can be completed with minimal travel and little disruption to their work and family lives. The online portion of the program will use both synchronous and asynchronous teaching modalities to create interactive, dynamic, and supportive communities of learning whose members will become integral participants in this specific program researching Indigenous Peoples and Recreation best practices.

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Program Requirements

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205.59.7 Graduate Courses

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New Courses:

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Appendix 1

CPRA Survey Summary:

Association Attitudes Towards
a National Model of
Professional Development



cpra education and professional
development committee

association attitudes towards a national model of professional development

summary of survey results

july 2013



CANADIAN PARKS AND RECREATION ASSOCIATION
ASSOCIATION CANADIENNE DES PARCS ET LOISIRS



cpra education and professional
development committee

association attitudes towards a national model of professional development

summary of survey results

prepared by:
craig cameron

july 2013

CPRA is a national charitable not-for profit organization with a voluntary board of directors dedicated to the promotion of recreation and parks and their benefits to the quality of life of all Canadians.

mission

To work together to advance the recreation and parks sector in Canada
- to enable the sectors to better support the development of healthy Canadian citizens, communities and environments.

strategic goal

To increase the capacity of our sector

Develop better sector information, effective collaboration, skilled professionals and improved quality

To enhance the excellence and sustainability of CPRA

Build unified direction and ensuring good governance and the long-term sustainability of the organization



Canadian Parks and Recreation Association

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background:

CPRA has entertained the prospect of establishing a professional development and certification program for several decades. The Board has established a committee to examine and guide the development of this goal. The recreation sector has fallen behind a number of other professions and sectors in recognizing the value of professional development and certification. Certification has become an increasing predominate factor in job postings across sectors.

In fall 2012 the CPRA Professional Development Committee [CPRA PDC] commissioned three research initiatives related to professional development and certification:

- 1) A survey of provincial and territorial [P/T] recreation and parks associations' attitudes
- 2) A global review of best practices in the recreation sector
- 3) A national sample of existing professional development models from other sectors.

These initiatives were undertaken by the PDC in collaboration with the Alberta Recreation and Parks Association and the University of Alberta, Faculty of Physical Education and Recreation.

Together, these initiatives will help to shape the national discussion with respect to professional development certification. They also play a significant role assisting the CPRA PDC pursue its objectives to:

- Identify the professional development and certification practices of organizations in their respective provinces and territories.
- Survey their membership in some fashion to determine the range of training that would be deemed as valuable.



pt association survey summary

The survey was conducted on-line and was made available for a six week period between March and April, 2013. It focused on capturing the national attitude towards professional development and certification.

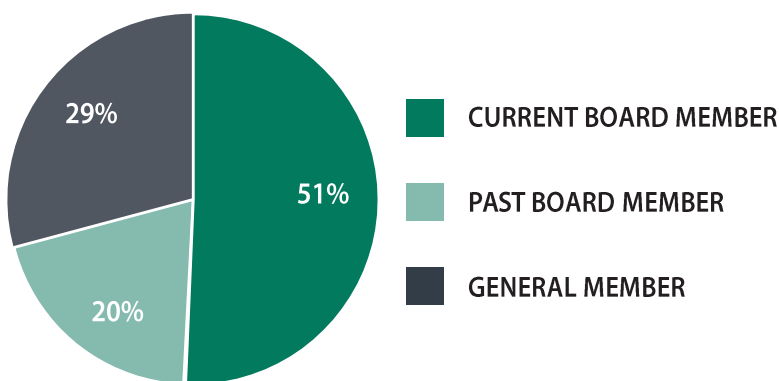
who took part?

The survey was sent to a defined group of P/T members. Each P/T association was invited to participate in the survey. Each association was asked to submit e-mail addresses for their current board members. They were also given the option to submit an equal number of e-mail addresses for persons of import to the field (e.g. past board members, government officials, community leaders). A final list of 177 individual e-mail addresses was compiled. Participants were contacted via a list serve. They received 3 reminders to complete the survey over the course of the six week period.

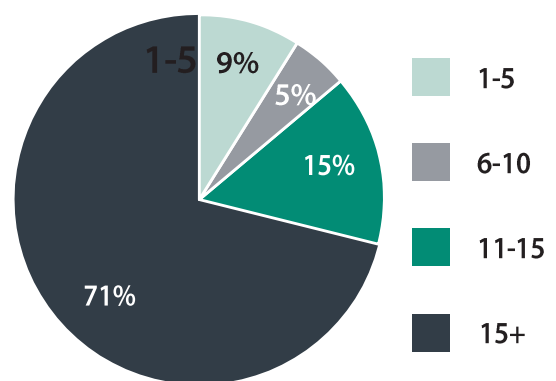
At the end of the survey period 83 individuals viewed the survey. Of this group, 66 participants completed the survey (N=66), providing a 37% response rate.

Male and female voices were equally represented in the responses. The majority of responses were from current board members ages 46 and over and who has spent over 15 years in the sector.

p/t status



years in the field

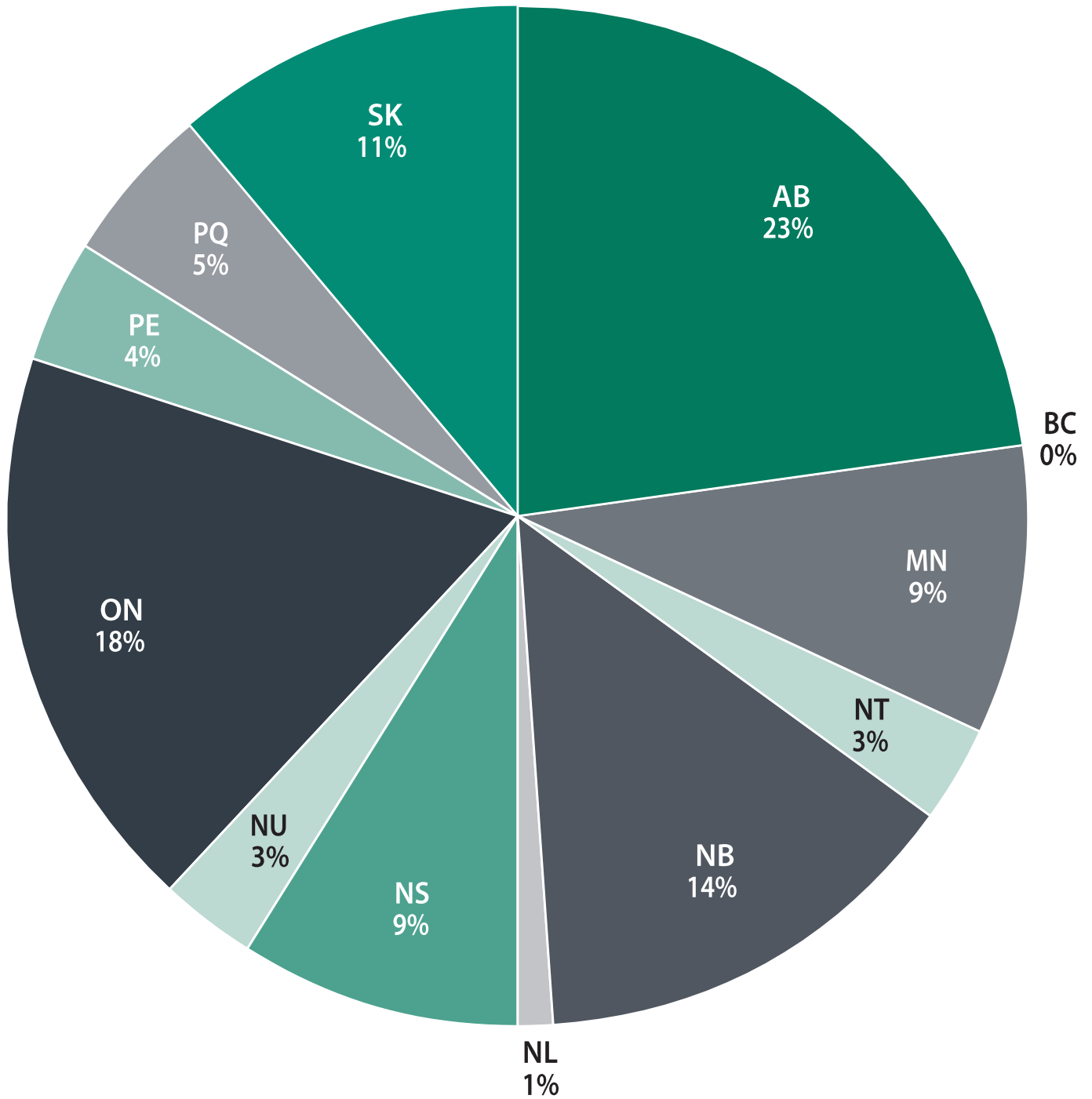


The dataset includes responses from 11 of the 13 P/T associations.¹

¹BCRPA declined the invitation to participate in the survey and survey organizers were unable to establish contact with RPAY during the survey period.



p/t proportion of responses



survey results summary:

The survey covered two thematic areas: attitudes towards the importance of professional development and attitudes towards professional development approaches.² Given the predominantly positive response to the survey questions, the results are reported in a combined percent of agreement (i.e. participant responded as 'strongly agree' or 'somewhat agree'). Context for these figures is provided through a summary of associated participant comments.

attitudes towards the importance of professional development

95% of participants agreed that professional development is critical to providing high quality parks and recreation programs and services and should be mandatory.

Comments:

- How will mandatory professional development be monitored? Given the cost and logistics is this a realistic short term step?
- The diversity of our field and the current sector model create major challenges to enforcing mandatory, professional development.
- How will a mandatory system be funded? It will be difficult to find funding for training, when many municipalities struggle to maintain infrastructure.
- There needs to be a clear distinction between mandatory professional development and certification. There two approaches are not viewed as mutually exclusive.
- While a mandatory system is effective, developing and running a mandatory system may not be the best use of CPRA's limited resources.

²Results are provided in a summary format. Raw data can be provided upon request.



100% of participants agreed that professional development should be formally recognized.

Comments:

- Formal recognition was viewed as important in terms of fostering pride in the sector and bringing greater value and recognition the sector.
- If formal recognition was adopted, then professional development opportunities need to be made available nationally.
- It should be clear who would acknowledge the recognition (e.g., employer, public, province, association).

90% of participants agreed that a national professional development model should be adopted by all P/T partners.

Comments:

- Any national model needs to provide space for regional adaptation.
- A national model would be viable with the majority of P/T associations in accordance.
- How will a national model be accepted municipally?
- Advancing professional development opportunities should not be impeded by a discussion of a national model.
- Would this become a provincial government issues, via their responsibility for education and training?
- The model could help to establish training standards.

100% of participants agreed that competencies provided an effective foundation for a national model.

Comments:

- Competencies need to be thoughtfully developed, inclusive of different realities and clearly articulated
- Competencies suggest a bias towards certification, this should be clarified.



	% agree
Individual growth and success	95%
Career advancement	92%
Increased labor mobility	91%
Creating job descriptions	80%
Meeting current organizational needs	89%
Meeting future organizational needs	94%
Strengthening the industry profile	98%
Developing leaders within the field	98%
Employee retention	89%
Building links to other professions	89%
Strengthening the connection with post-secondary institutions	91%

94% and 91% of participants agreed that certification is an effective way to formally recognize professional development and to establishing a national professional development model, respectively.

A national model of professional development was viewed as important for:

Comments:

- Standardization for service delivery should be considered a key advantage



	% agree
Senior Manager	95%
Middle Manager	97%
Entry Level Position	90%
Facility Operator	95%

attitudes towards professional development approaches

100% of participants agreed that professional development should be tailored to different job responsibilities.

Professional Development opportunities should be targeted towards people in different positions or stages of their career.

Comments:

- The career categories offered did not resonate across all P/T associations.

	% agree
Generate Revenue for CPRA	63
Generate Revenue for P/T associations	66
Operate at cost recovery	79
Be partially subsidized by P/T associations	46
Be fully subsidized by P/T associations	19

Responses to how a professional development costs and revenue should be distributed varied.

Comments:

- CPRA efforts should not have a negative impact on existing P/T training revenue
- Partial subsidization may encourage member interest and engagement
- More information on the goals of a notational professional development model may be necessary to adequately respond to this question.



The following organizations were seen to have a role in developing a national model for professional development and delivering professional development opportunities.

	% agreement	
	develop model	deliver opportunities
CPRA	97	89
P/T Associations	100	98
Federal Government	65	34
P/T Government	66	48
Municipal Government	75	52
Post-secondary	97	94
Private Enterprise	63	55
Other	73	57

- Delivery should be accessible to as wide a group as possible.
- Topics and information must be current
- Could be developed as complete package and contracted out through third-party
- Strong voice for the 'working' sector is critical in development and delivery
- More information on the goal of the program is needed



summary

The survey results indicate strong widespread support for advancing a competency-based national professional development model. There is also a strong desire to have some form of formal recognition engaging in professional development and certification is valued as a mechanism for achieving this.

Moving forward, it is incumbent upon the CPRA PDC to continue to engage all P/T partners in establishing a professional competencies framework for the sector and in discussions related to an appropriate system of formal recognition.





Prepared by ARPA on behalf of CPRA

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Appendix 2

ARPA Member Survey

Summary



alberta recreation and parks association member survey summary

june 2013



alberta recreation and parks association member survey summary

june 2013

ARPA is a provincial charitable not-for profit organization with a voluntary board of directors dedicated to the promotion of recreation and parks and their benefits to the quality of life of all Albertans.

our vision

"A province, and communities within, that embrace and proactively use recreation and parks as essential means for enhancing individual well-being and community vitality, economic sustainability and natural resource protection and conservation."

our mission

ARPA strives to build healthy citizens, their communities and their environments throughout Alberta. For more information on ARPA, our programs or services or the benefits of recreation and parks please visit our website at <http://www.arpaonline.ca>.



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summary

The 2013 ARPA professional development member survey provides a solid foundation for moving forward with a more structured and proactive professional development system. Members from across the province and all stages of their career are engaging in professional development on a regular basis and are looking to ARPA to help them identify professional development opportunities that are relevant, accessible and of a high standard.

This survey marks the first time that members were introduced to the modified core competencies framework. Responses to competency based questions were high, suggesting that the competencies resonated with members and their professional development activities. Respondents were also able to use the competencies to identify areas in which they would like more training or support (E.g., Leadership).

The survey confirms the wide held assumption that recreation and parks practitioners enter the sector with a wide variety of experiences and educational backgrounds. As such, it is critical that professional development opportunities provide deliver philosophical knowledge, as well as, personal and technical skills.

Finally, the survey results indicate that members see professional development as a key contributing element of their job performance. While engaging in professional development is not considered in all members' performance review, the overwhelming majority of members believe that is should be. This is a signal to ARPA that its members desire a professional development program that assists them in gaining formal recognition for professional development.

recommendations

Based on the survey results the education and professional development committee makes the following short-term recommendations:

- ARPA should develop a system for cataloging professional development opportunities
- ARPA should help members to help them access professional development opportunities that meet personal and sector needs
- ARPA should work with CPRA to develop a coordinated professional development system

methods

The survey was developed by sub-committee of the Education and Professional Development Committee.

It was delivered on-line over a six week period between May and June , 2013. The contest was marketed towards current Association members through Reconnect, E-Blasts, and on the Association web-site, but was open to anyone working in the sector.

The survey netted 216 usable responses.

The results of the survey are divided into sections:

- 1) Demographic information
- 2) Attitudes towards Professional Development
- 3) Professional Development Needs

demographics

68% of respondents identified as a current Association member. Of this, 50% had only been a member for up to five years.

Respondents were 62% female, with an average age of 38 years. Seven percent (7%) of respondents identify with a minority socio-cultural group

75% of respondents work in municipal government.¹ Responses were evenly distributed between director, supervisor, manger, and front line positions. However, specific job titles were much more diverse.

Respondents identified most strongly with recreation (48%), recreation and parks (32%), parks (11%), and facilitates (10%), respectively.

78% of respondents held an undergraduate or graduate degree, with 60% receiving their formal education directly in recreation and parks (see Appendix A).

Respondents are members of a variety of professional organizations and hold a number of different certification, the majority of which are not required for employment.

¹ Sectors not included in the study include: post-secondary education, health, and education.

appendix a: other fields of study

Fitness and Leadership	Accounting –CMA	Geography
Local Government	Fine Arts	Community Development
Administration	Interior Design	Urban Planning
Social Work	Physical Education	Human Ecology
Community Development	Political Science	Agriculture
Education	Special Events	Engineering
Human Resources	Municipal Government	Health
Management	Landscape Architecture	Economics
Public Administration	Nursing	Neuro-linguistic Programming
Arts	Hairdressing	Computer Science
Business	Law Enforcement	Science
Kinesiology	Insurance	

attitudes towards professional development

The top four areas,² in which professional development was viewed as important are: individual growth, developing leaders within the field, career advancement, and employee retention.

70% of respondents had professional development included as part of their performance review. Of those who did not 88% believed that it should be.

91% of respondents felt professional development should be a requirement of employment.

The majority of professional development opportunities currently offered through ARPA were attended because of personal interest and were not a required by employers.³

Respondents also engaged in professional development through other avenues, such as: their employer, conference, workshops, post-secondary education, and professional certifications.

professional development practices

64% of respondents have a professional development plan.

74% of respondents said their employer encouraged developing a professional development plan.

42% of respondents' employers required a professional development plan.

73% of professional development activities were fully subsidized by employers and 82% of employers dedicated employee time to engaging in professional development.

About 70% of respondents were able to use the new competency framework to categorize their recent professional development activities.

² As indicated by a 50% or higher rating to 'strongly agree'.

³ High-Five, YDRS, and Risk Management were the exceptions with equal rates of personal interest and employer requirement.

professional development needs

Respondents were eager to engage in professional development in a variety of ways, with no strong preferences for delivery.

In the next three year, respondents were most interested in professional development opportunities related to Leadership, Community Engagement, and Organizational Management.⁴

January, February and March, October, and November were identified as the best months to engage in professional development.

89% of respondents said a predictable schedule of professional development opportunities would help them to engage in regular professional development.

48% of respondents wanted to learn about events six months before it occurs. While the majority of senior level respondents wanted to learn about events before their annual budget was set.⁵

97% of respondents were willing to travel for professional development opportunities. The travel radius varied, with the comment that quality of opportunity was a key factor on travel.

arpa's role

Respondents were asked about their preferences for learning about professional development opportunities. Traditional communications methods came out on top (i.e, Newsletter – 94%, Website – 86%, personal e-mail – 81%, employer communication 77%). The exception was social media, which came back at 50%

When asked about how ARPA should demonstrate leadership in professional development, respondents strongly agreed that ARPA should catalogue and promote opportunities (100%) and create and delivery opportunities (97%). There was moderate support for ARPA helping members to track and organize their professional development (57%).

⁴This was assessed at 50% or greater responses to 'strongly agree'.

⁵ Respondents were not asked when their annual budget was set.



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Appendix 3

Phase Three – Final Report:
Alberta Recreation Industry
Labour Market Analysis

May 2005

Phase Three - Final Report (1).doc

*Alberta Recreation Industry
Labour Market Analysis*

May 2005



Recreation for Life



Government of Canada
Gouvernement du Canada

Canada

ARPA is a provincial charitable not-for profit organization with a voluntary board of directors dedicated to the promotion of recreation and parks and their benefits to the quality of life of all Albertans.

Our Vision...

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For more information on ARPA, our programs or services or the benefits of recreation and parks please visit our website at <http://www.arpaonline.ca>.

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Analysis 77

Report Prepared By:

Manecon Business Strategies Inc.

Executive Summary

This is the report of the third in a series of four studies of Alberta's recreation industry. Together with a separate report entitled *A Framework for Recreation Education and Training in Alberta*, it is the outcome of Phase Two of a project on *An Alberta Recreation Industry Labour Market Analysis*, begun in 2002.

This report describes key characteristics of the recreation industry's labour market, based on research conducted in 2004. The research program included an assessment of education and training needs in the industry, leading to development of a framework for education and training consistent with the needs and expectations of the industry.

The report presents a detailed analysis of the recreation industry labour market and the economic and political environment in which the industry operates. It incorporates a detailed examination of labour market demand and supply, employment conditions, job content, and skills and knowledge.

The first two studies in this project - completed in 2003, and collected into a single document entitled *An Alberta Recreation Industry Labour Market Analysis, Phase One: Setting The Scene* - provided a definition of the industry, an understanding of the industry's value, and a perspective on its future development in the province. (The document is available from ARPA.) That document guided the research for the second Phase of the project, encompassing a detailed analysis of the labour market and development of a proposed recreation education and training framework.

The first Phase of the project adopted a definition of the industry with the following four principal categories: fitness, active living, and health promotion; amateur sport; outdoor recreation and parks; and community recreation. This definition was retained for the second Phase of the project.

The methodology employed in the current research included a comprehensive program of qualitative and quantitative methods as well as an intensive secondary research program addressing these four industry segments.

The framework for education and training is described in a separate report in this series, entitled *A Framework for Recreation Education and Training in Alberta*. (For ease of reference, that report will be referred to hereafter as *The Framework Report*.) It includes an assessment of the evolution of recreation education and training in the province. As well, it provides a perspective on strategies that Alberta can pursue to position itself as a leader in the recreation industry and in recreation education and training in the years ahead. An education and training action plan for the period 2005 to 2015 is also included in *The Framework Report*.

The research program explored a selection of innovative and promising practices and approaches in recreation education and training, also described in *The Framework Report*. Adopting these innovative approaches will contribute significantly to positioning the industry appropriately.

Summary of Findings and Recommendations

Trends Influencing the Industry

The recreation industry is increasingly influenced by growing demand and changing industry trends. Demographic change and market evolution, political and economic priorities, increasing awareness of health, rehabilitation, therapeutic recreation, and active living, and specialization of recreation disciplines directly impact the industry.

Competition for limited financial resources and employees, increasing costs and operating revenue and customer demands lead the industry to take innovative business approaches. The report shows that recreation professionals need to have strong business skills, including leadership, marketing, innovation and negotiation skills to be successful in pursuing these opportunities.

New development opportunities for the industry will continue to arise on an ongoing basis. The industry should embrace these and energetically pursue them. The research concludes that this is a strength of the industry that should be celebrated in new alliances.

Industry experts believe that the current image and positioning of the recreation industry constrain recruitment and limit recreation funding. The report suggests that ARPA and its recreation industry partners should continue to build and promote a clear image and positioning through appropriate partnerships and alliances as Alberta plans for a post-debt era.

Industry Leadership

The research noted that many leaders in the industry are aging, considering retirement, or getting promoted out of the industry. Vibrant and enthusiastic leadership is essential to continue to guide the industry forward. The report documents industry conclusions that steady reductions in recreation education programs at post secondary institutions, limited career opportunities, non-competitive employee compensation, and industry working conditions may significantly limit the supply of new leaders for the industry.

Professional development and mentoring programs are essential to address this issue in the short term and the industry must place more emphasis on focused post secondary education programs to provide the longer-term human resource base of qualified employees. *The Framework Report* contains a proposals for professional development.

Labour Market Trends

This report shows that recreation industry employers have increased staffing in recent years and expect significant further growth in numbers of employees in most job categories, particularly in program related areas and in marketing.

Ideals rather than salaries motivate recreation industry employees and many students to pursue recreation as a career. Increased labour market competition, offering career opportunities and higher pay, make other sectors of the economy attractive. The report suggests that innovative revenue and operating strategies and alliances must be implemented to counteract such transitional challenges in the industry.

Economic and organizational restructuring has changed the face of the industry's labour market. The industry is hard pressed to compete for qualified employees due to limited pay scales.

The industry relies extensively on the commitment of volunteers, who contribute their time and spend their own money on required certification. Part-time and seasonal work is also very prevalent in the industry.

Employment Trends

There is significant mobility into and within the industry. The largest proportion of employees joined the industry directly from their education. The report examined a significant trend in early-career attrition.

The report shows that recreation industry professionals are in demand in other industries because of their well-rounded education and their values.

Education and Training

The industry must ensure it has a strong resource of individuals appropriately prepared for leadership, to build the appropriate alliances and partnerships with related mandates, to meet the needs of its marketplace, and to deliver effective and safe public facilities, programs, and events. The report describes strategies to pursue these goals.

Enhanced programming is needed for education; more programs and better access are needed for professional development. While this is an issue throughout Alberta, remote and rural communities are particularly challenged.

The report describes a professional development mandate for ARPA and the industry, including a recommendation that the industry pursues certification for recreation professionals. Certification is expected to contribute to building the stature and recognition of recreation professionals.

It is clear that a collaborative thrust by educators, trainers, operators in the industry, government agencies, and industry associations will be most effective to build a strong human resources program to feed the industry's future growth.

Education and Training Needs and Expectations

A large proportion of jobs require formal education in recreation or related disciplines or, mostly where liability exists, certification. While employers recognize the contributions of the existing recreation education system in preparing employees for the industry, there is a measure of 'disconnect' between educators and practitioners in the field. This leads to development of strategies to build closer integration.

The employers identify skill and knowledge deficits in several areas, significantly to do with business or general management, human resources management, or leadership. Professional development is constrained by location, time, and money and by the availability of suitable programs. Consequently, there are few programs suitable for the industry. The report recommends that ARPA take an active role to establish a professional development focus.

Innovative delivery and carefully planned content are important to stimulate a vibrant education and training environment. It is important to provide new approaches to make training and education more available. Using innovative approaches and best practices drawn from around the world, as well as the input of recreation industry professionals, this report provides the foundation for the framework and the plan for recreation education and training that are described in *The Framework Report*.

Industry Segments

Summaries in this report show that the four recreation industry segments generally agree on the trends that influence their industry and their needs for a suitable education and training environment. However, the report shows more marked differences between the labour environments of municipalities and not-for-profit societies and between rural and urban market employers. These relate to rates of pay, organization structures, human resource strategies, and recruitment. The differences point to reasons that private sector and not-for-profit organizations experience such difficulty finding and hiring qualified and experienced employees. This challenge is exacerbated in rural communities.

Recommendations

The industry must address its strategic positioning and fill the gaps this report identifies in education and training. Without doing so it will be seriously challenged to meet the growing needs and expectations of Albertans. Adopting the innovative and promising practices described in the 'framework report' will make the recreation industry system flow and will contribute to retrieving Alberta's position as an acknowledged leader in recreation development and recreation training. It is important to 're-connect the disconnects' between recreation and training and the field. This will require the commitment and concerted effort of all players.

The industry should execute an action plan, such as that described in *The Framework Report*, for progressive development of the industry and its education and training system. Appropriate stakeholders must be included.

Conclusion

The research has shown that the recreation industry must move aggressively to position itself in relation to related industries and must enhance the attractiveness of recreation careers and education. It must pursue new strategies for skill and knowledge development. These issues are addressed both in this report and in *The Framework Report*. The industry must also pursue innovative growth strategies.

Recreation is a significant foundation of the *Alberta Advantage* and of the lifestyles of Albertans. New realities, marketplace trends, and alliance opportunities present an extraordinary opportunity for the industry. The industry should embrace and lead change. It will continue to evolve in response to changing demand in a fluid marketplace. The recreation industry provides the professionals who facilitate active living – a priority for all Albertans. This is cause for pride and celebration.

Section I. Introduction

This research constitutes the third and fourth studies in a two-phase research project on *An Alberta Recreation Industry Labour Market Analysis*, begun in 2002.

The first two studies in the project (Phase One) addressed the economic value of the industry and provided a perspective on its future direction. The report from those two studies examined the value and contribution of the recreation industry to and within Alberta's economy, analyzed trends and external factors that influence the industry, and offered a perspective on its future.

This document is the report of the third study in the project. It describes the labour market in Alberta's recreation industry and explores the expectations of the industry for education and training to provide for the industry's future needs. The report from the fourth study (*The Framework Report*) examines the existing recreation education and training environment and offers a framework for an education and training system that is consistent with the needs and expectations of the recreation industry.

The research for this second Phase of the project was conducted in 2004 for the Alberta Recreation and Parks Association (ARPA) and was funded by Alberta Community Development, Alberta Human Resources and Employment, and Alberta Economic Development.

Purpose and Direction of the Research

The purpose of the current research was to document the labour market, to determine the needs and expectations of the industry with respect to the development of its human capital, and to suggest a framework for education and training that would meet those needs and expectations. Thus this research brings into focus the industry's human resources component. A comprehensive methodology integrated qualitative and quantitative research approaches to address these goals.

Methodology

The research was conducted employing a set of integrated methods as follows:

An extensive secondary research program was undertaken to explore the environment in which Alberta's recreation industry operates and to assemble knowledge about the labour market, the recreation industry and interfacing influences, the existing and historical education and training program, and the economic environment.

An integrated program of web-based surveys was carried out to explore the industry's labour market and skill and knowledge base in quantitative terms.

These surveys targeted employees and employers in the industry.

The focused invitations to participate in the survey were distributed via email on behalf of the consultants by several organizations, including ARPA, Alberta Community Development, Alberta Municipal Affairs, all members of the Project Steering Committee, Alberta's Regional Recreation Associations, and the consultant's own list of recreation industry contacts.

In all, 463 responses were recorded, including partial responses. As some questions were asked of only selected groups of respondents, smaller numbers of responses are included in most analyses.

A program of exploratory interviews and focus groups was undertaken to examine certain key issues in further depth and to contribute the perspective of a selection of key industry participants in the interpretation of data collected in the survey.

The focus group discussions were conducted with students currently enrolled in recreation education programs at the University of Alberta, Red Deer College, and Mount Royal College. One group included a combined group of students from the University of Alberta and Red Deer College. Working in formal and informal groups of 5-6 students, a total of 20 discussions were facilitated.

These discussions focused on four key issues. These were articulating recreation, reasons for selecting a recreation education, the value of educational experience when tested in work experience, and career aspirations.

The exploratory interviews with industry leaders included executives in a cross section of industry groupings, including government, facilities, regional recreation associations, front-line recreation service deliverers, and suppliers to the industry. In all, 35 interviews were conducted. Further, informal interviews were also held with suppliers attending the ARPA Annual Conference at Jasper in October 2004.

The interviews were organized to examine key trends in the industry and its labour market and to provide insight that would contribute to the interpretation of the survey data.

Exploratory interviews were also conducted with recreation educators and trainers. In all, 10 such interviews were conducted.

These interviews were conducted to gain the perspective of educators on the evolution, *status quo*, and future opportunities for education and training in the industry.

A job content analysis was conducted on over 200 position postings in the industry. Additional jobs were identified through the survey response.

A program of secondary research explored best practices and innovation in recreation training and education with particular focus on North America, the United Kingdom, Australia, and New Zealand.

The research employed electronic, library, and telephone interview methods.

The results of the research programs were integrated to achieve the study purpose and objectives. The use of a comprehensive methodology blending qualitative and quantitative methods was an effective approach to this research.

Survey Demographics

The following tables present an analysis of the survey response, compiled to illustrate the comprehensive distribution of the data to various recreation industry segments.

Table 1.1 (below) shows that the response was distributed broadly across the industry segmentation as defined in the Phase One report. This segmentation is presented under the heading 'Recreation Industry Grouping'.

Organization Category	Recreation Industry Grouping										Total	
	Fitness, Active Living, Therapeutic, Health, Rehab.		Amateur Sport		Outdoor recreation, Parks		Community Recreation or Development; Aquatics		Education, Professional Services, Program Admin		N=	%
	N=	%	N=	%	N=	%	N=	%	N=	%		
Private sector	9	15.5%	1	2.2%	3	6.1%	6	2.4%	7	17.9%	26	5.9%
Not for profit	12	20.7%	27	58.7%	13	26.5%	29	11.8%	12	30.8%	93	21.3%
Government	21	36.2%	17	37.0%	33	67.3%	206	84.1%	4	10.3%	281	64.3%
Education, health, community sv cs	16	27.6%	1	2.2%			4	1.6%	16	41.0%	37	8.5%
Total	58	100.0%	46	100.0%	49	100%	245	100.0%	39	100.0%	437	100%

Table 1.1 – Survey Demographics

To aid in interpretation of the survey results, exploration of the survey data also examined differences between the four primary types of organization included in the survey response. These are government; not-for-profit; education, health and community services; and private sector.

Table 1.2 shows the primary focus of the organizations included in the survey response. Again, the data are well distributed to the areas of primary focus, including front line delivery, health and fitness-related mandates, community development, planning, administration, and professional services. Questions detailing the nature of the organization and the market it serves were asked only of the employers. A total of 272 responses were received from industry employers.

Table 1.2 – Primary Focus of Survey Respondents

Primary Focus of Organization	Recreation Industry Grouping										Total	
	Fitness, Active Living, Health Promotion		Amateur Sport		Outdoor recreation, Parks		Community Recreation		Education, Professional Services		n=	Col %
	n=	Col %	n=	Col %	n=	Col %	n=	Col %	n=	Col %		
Activities, entertainment, events, festivals	11	35.5%	24	72.7%	9	20.9%	48	34.5%	5	19.2%	97	35.7%
Facilities, parks, environment	2	6.5%	1	3.0%	20	46.5%	46	33.1%			69	25.4%
Community development, administration	3	9.7%	2	6.1%	8	18.6%	18	12.9%	1	3.8%	32	11.8%
Health, fitness; rehab; therapeutic	12	38.7%	2	6.1%			7	5.0%	2	7.7%	23	8.5%
Comprehensive programming; industry supply					3	7.0%	14	10.1%			17	6.3%
Professional, educational, financial resources	3	9.7%	4	12.1%	3	7.0%	6	4.3%	18	69.2%	34	12.5%
Total	31	100%	33	100.0%	43	100%	139	100.0%	26	100%	272	100%

The survey response showed balanced geographic distribution. The geographic distribution of the response is presented on the following page.

The table shows that 62% of the organizations included serve urban markets and 37% rural markets. More than a quarter of the organizations serve the market from multiple locations and the remaining respondents are well distributed to cities, towns, and villages across the province.

The age of the organizations ranged from new ventures to municipalities with long histories. Thus, opinions reported included those of both new and well-established ventures and organizations.

Table 1.3 - Geographic Distribution of the Sample

	Recreation Industry Grouping						Total
	Fitness, Active Living, Health Promotion	Amateur Sport	Outdoor recreation, Parks	Community Recreation	Education, Professional Services		
Urban/Rural Market							
Urban Alberta	75.0%	79.3%	64.9%	51.5%	77.8%	61.6%	
Rural Alberta	25.0%	17.2%	35.1%	46.9%	22.2%	37.2%	
Outside Alberta		3.4%		1.5%		1.2%	
Market Area							
Multiple locations	22.6%	60.6%	34.1%	12.6%	50.0%	26.7%	
Edmonton Region	29.0%	57.6%	36.6%	20.7%	46.2%	31.2%	
Calgary Region	29.0%	42.4%	9.8%	10.4%	38.5%	19.2%	
Red Deer	6.5%	24.2%	9.8%	11.1%	11.5%	12.0%	
Lethbridge	12.9%	27.3%	4.9%	2.2%	19.2%	8.6%	
Medicine Hat	6.5%	15.2%	4.9%	1.5%	7.7%	4.9%	
Grande Prairie	3.2%	21.2%	7.3%	8.1%	7.7%	9.0%	
Fort McMurray	6.5%	12.1%	4.9%	3.0%	7.7%	5.3%	
North Rural	6.5%	6.1%	17.1%	17.8%		13.2%	
Central Rural	3.2%	6.1%	4.9%	14.1%		9.0%	
South Rural	9.7%		14.6%	6.7%		6.8%	
Other Locations		3.0%	2.4%	4.4%		3.0%	
Total	135.5%	275.8%	151.2%	112.6%	188.5%	148.9%	
	31	33	41	135	26	266	

The survey also included respondents holding a wide range of responsibilities. Table 1.4 shows the respondents' overall area of responsibility, showing that approximately 63% of the respondents are in general management or supervision.

Table 1.4 – Overall Area of Responsibility of Respondents

Respondent's overall area of responsibility	Recreation Industry Grouping										Total	
	Fitness, Active Living, Health Promotion		Amateur Sport		Outdoor recreation, Parks		Community Recreation		Education, Professional Services		n=	%
	n=	%	n=	%	n=	%	n=	%	n=	%		
General management and supervision	16	38.1%	25	65.8%	26	66.7%	136	69.7%	11	40.7%	214	62.8%
Administration, clerical			4	10.5%	7	17.9%	6	3.1%	2	7.4%	19	5.6%
Financial management	1	2.4%	1	2.6%			1	.5%			3	.9%
Marketing, sales, or communication					1	2.6%	1	.5%	3	11.1%	5	1.5%
Research and technology	2	4.8%					1	.5%	6	22.2%	9	2.6%
Leaders or interpreters	7	16.7%					9	4.6%			16	4.7%
Skilled trades or equipment operators	1	2.4%			2	5.1%	3	1.5%	1	3.7%	7	2.1%
Retail clerks or customer service	1	2.4%	1	2.6%			1	.5%			3	.9%
Other recreation jobs	14	33.3%	7	18.4%	3	7.7%	37	19.0%	4	14.8%	65	19.1%
Total	42	100.0%	38	100.0%	39	100.0%	195	100.0%	27	100.0%	341	100.0%

Most of the respondents who selected ‘other recreation jobs’ in the survey instrument are employed in government positions and are focused on programming and delivery of recreation.

Table 1.5 shows that 58% the survey respondents hold a formal recreation qualification or certification and that they are distributed broadly across the industry segments.

Table 1.5 – Formal Recreation Qualification

Formal recreation qualification or certification?	Recreation Industry Grouping										Total	
	Fitness, Active Living, Health Promotion		Amateur Sport		Outdoor recreation, Parks		Community Recreation		Education, Professional Services		n=	%
	n=	%	n=	%	n=	%	n=	%	n=	%		
Yes	28	66.7%	19	54.3%	10	26.3%	114	62.0%	18	69.2%	189	58.2%
No	14	33.3%	16	45.7%	28	73.7%	70	38.0%	8	30.8%	136	41.8%

Further, the data show that the respondents represent a wide distribution of working experience (years of employment), age, educational achievement, and income.

Limitations

Limitations associated with privacy legislation constrained direct access to the targeted respondents by the consultants. Thus intermediary organizations with extensive direct contact lists agreed to distribute the invitation to participate in the survey to their contacts, with a request that those recipients, in turn, also distribute the invitation to their own list of contacts. The invitation included a URL that linked the respondent directly to the web-based survey instruments.

Given the frequent action by several organizations to distribute the invitation to participate in the survey, the response was somewhat disappointing. However, the survey response provided good insight into all of the major groupings in the industry.

Assessing this challenge during the period of study design, it was determined that the most significant issues from the perspective of the study would be generally consistent across the industry and that the comprehensive methodology would contribute perspective that would result in a balanced view. That proved to be the case.

As a result of the limited survey response, some detailed analyses of the resulting data are based on small sample sizes and do not result in predictions with a high degree of confidence. For this reason, caution should be used in using some tabular data displayed in the report.

The Phase One report developed a framework that defined the structure of the recreation industry. Although that definition included suppliers to the industry (manufacturers, distributors, and retailers), preliminary discussions with representatives of those segments of the industry determined that, in most cases, they see themselves as suppliers to the recreation industry, rather than as members of it. Therefore, the survey invitations were not directed to these organizations: instead, those segments were included in the qualitative interview program.

Slightly more than half of the responses are from government organizations or agencies.

Confidence in the Results of the Research

Overall, the integrity of the data is strong and summary results presented appear to represent industry trends described by interviewees in the industry interview program. The strong convergence between the different sources of data and methods of inquiry used in the research provide a high degree of confidence in the conclusions drawn from the research.

Multiple methodologies were used in this research to aid in interpretation.

Acknowledgments

The consultants take this opportunity to express their gratitude to Rick Curtis, Executive Director of ARPA, Dr. Tim Burton, ARPA’s Project Manager, and the members of the Steering Committee for their insight and guidance in the research. Further, we acknowledge the contribution to the growth of the recreation industry and its education and training system by

the many industry professionals who participated in the study through the qualitative interviews and focus groups and by completing the surveys.

Section II. Recreation Industry Analysis

Factors Influencing the Demand For, and Delivery Of, Recreation Services In Alberta

Several factors that influence the participation of Albertans in recreation also influence the industry's labour market.

Human Geography

Alberta is the fastest-growing province in Canada in terms of income, employment, and overall economic activity. The rate and distribution of growth within Alberta will impact the need for recreation services and the human resources required to provide those services.

Urban Growth

The Province of Alberta has a population of 3 million and because of its robust economy it is expected to reach 3.4 to 3.7 million by 2011. The majority of economic growth is occurring along the Highway 2 corridor between Edmonton and Calgary and in major resource-based communities. This growth in population is creating an increase in demand for infrastructure and community services including health, education and recreation in this corridor.

As the population ages, it is projected that there will be rapid development in urban suburbs which will further increase demand and impact the type of facilities and services that are required. In addition, increasing housing densities in other urban areas will alter the need for and the provision of recreation services.

"New and redeveloped facilities must be accessible to all members of the community and responsive to a wide range of community needs. Facilities which once served primarily children and youth will be redeveloped to serve all ages, both genders, and a wider range of users"

City of Edmonton: Facility Recreation Master Plan 2005-2015. June 2004

Rural Depopulation

Although urban areas in the corridor are experiencing rapid growth many communities in Alberta are not. Ninety-five percent of communities in Alberta have a population of fewer than 10,000 people and are located outside the commuting distance of the larger urban areas. Due to centralization of services, employment, health, and education opportunities in urban areas, as well as overall changes in the economy, rural depopulation is increasing. The largest decline is in the number of youth between 15 and 29 years of age. Consequently, rural populations have a higher percentage of residents over the age of 65 than is found in urban centres.

Rural depopulation is resulting in a loss of human resources and leadership. The closure of businesses, schools, health facilities, and government offices further reduces the population and the tax base. As a consequence, small communities are increasingly unable to generate the financial resources to maintain and develop essential services thus further limiting rural quality of life and the communities' capacity to attract new residents and economic opportunities.

"Recent research shows that the viability of over 75% of Alberta's small communities is in question."

"Towards a Comprehensive Rural Development Strategy for Alberta", Alberta Agriculture, Food and Rural Development, 2002.

Northern Development

Mineral exploration, the oil sands projects in the Athabasca region, the Mackenzie Valley Pipeline and adventure and eco-tourism initiatives are rapidly increasing the population of northern Alberta. New communities such as Horizon, 300 km northeast of Edmonton, are being constructed and northern centres such as Fort McMurray are experiencing expansion in

order to accommodate the influx of workers. Recreation facilities and services will be required to meet the needs of the temporary work force, the longer-term residents, and the aboriginal communities that are impacted by the development.

“The oilsands industry is anticipating the number of permanent jobs in Fort McMurray to double to 17,000 in the next decade. The industry feeds three times as many contract and service jobs, as well as thousands of temporary construction positions.”

Cheryl Knight, Executive Director of the Petroleum Human Resources Council of Canada – In The Financial Post. August 2004. FP 8.

Socio-Economic and Demographic Changes

Statistics Canada's 2001 Census analysis identified a series of changes in the socio-economic and demographic profile of Alberta. These shifts will profoundly impact demand for public services and the public policy agenda in the province in the future.

Age Distribution

It is well recognized that Alberta's overall population is aging. The fastest growing population group is the 80 year old and over cohort. The second fastest growing sector is the 45-64 year old population. There is moderate growth in the other remaining adult populations due to immigration and the in-migration of working age adults from other parts of Canada. There is slow to no growth in the under 9 years of age, 10-14 and 15-19 year old populations.

- Significant Differences in Rural Populations
 - Rural populations are older with 11.4–15% being over the age of 65 while 10% of the population is over 65 years old in urban communities.
- Significant Differences in Aboriginal Populations
 - Aboriginal populations in Alberta are younger with 44.3% in the 0-19 year old category and with higher birth rates are growing much faster than the non-Aboriginal population - at a rate of almost 27% compared to 10% growth for the overall population. More than three quarters of Aboriginal people live off reserve, mostly in cities.

Gender Distribution

Alberta's ratio of men to women is virtually equal.

Level of Education

- There are significant differences in level of education in rural areas.
 - Over 15% of the urban population in Alberta holds a university degree, whereas in some rural communities only 8% do.
- There are significant differences in level of education of Aboriginal population.

Income Distribution

Alberta's before tax median family income in 2001 was \$60,000, which is above the national average of \$55,016.

The incidence of low income for all populations in the province was 33.2% and 34.5% in urban areas.

The amount of credit card debt in Alberta in 2004 is 4% higher than the national average. Personal bankruptcy in Alberta increased to 6.1% (in the twelve month period ending June 2004) well ahead of the national average of 4.9%. Although the province's economy is booming these figures suggest that many in Alberta are struggling with their personal finances.

- There are significant differences in rural income.
 - The incidence of low income in rural Alberta was 20.8%.
- There are significant differences in Aboriginal population
 - The average individual income (2000) for Aboriginal males was \$26,490 and \$12,359 for females. The incidence of low income for all Aboriginals in the province was 50.5% (20) and 51.6% for Aboriginals living in urban areas.

Cultural Origins

15% of Alberta's population was foreign born in 2001. Alberta had 329,900 visible minorities, but they comprised a greater share of its population (11%). The visible minority groups with the highest proportions in Alberta were Chinese (3.4% of the provincial population), South Asians (2.4%) and Filipinos (1.2%). The vast majority (91%) of visible minorities in Alberta lived in the census metropolitan areas of Calgary and Edmonton. They accounted for 17% of Calgary's population and 15% of Edmonton's. They also are well educated; over 42% of Alberta's immigrants had a university degree in 2001.

Leisure Trends

The recreation industry is dynamic due to the continuing evolution of leisure trends and the influence of other, often related trends.

The Changing Role of Recreation

Changing recreation participation patterns in Alberta reflect not only changes in the socio-demographic profile in the province but also a broadening of society's understanding of the role of recreation in people's lives. Increasingly recreation is seen as a means to achieve "personal psychological well-being, physical well-being, community well-being, and personal enhancement through learning, as well as increased social interactions," and connectedness. There is increasing awareness that recreation opportunities are essential elements in creating and sustaining the quality of life in communities.

Changing Trends In Leisure Preferences and Participation

- Since 1981 the Alberta Recreation Survey has tracked the changes in participation and preferred recreation activities in the province. Successive studies, including the 2004 Alberta Recreation Survey, have identified key trends that include:
 - An aging population, with the Baby Boom generation passing 50;
 - Greater interest in individualized activities and activities which are family-oriented;
 - The constraint of time and the greater value placed on leisure time;
 - The growth and diversity of the Alberta economy and the influence of this on population migration from across Canada and elsewhere;
 - An increasing role of private partners in public ventures;
 - Increasing need to address inequalities in access for low-income families, people with disabilities and special needs, Aboriginal and other marginalized groups;
 - The appearance of specialized niche recreation programming to meet demands from women, seniors and youth.

Several trends can be seen in the changing recreation preferences and demand for service:

- Increasing concern with personal health and well-being is driving participation in activities such as aerobics and weight training;
- Young families are looking for relatively inexpensive individual and group activities, such as day hiking and soccer;
- Interest in personal development is fueling participation in recreation/life-long learning courses;
- Increasing desire for flexible access is increasing the need for individual pursuits with informal program structures and schedules, and drop-in services as opposed to more structured team sports;
- Home-based stress-relief activities that take place outdoors such as walking, gardening and biking have continuing and growing importance;
- Arts and cultural activities such as visiting museums and galleries are gaining in importance;
- Increasing participation in golf, attending educational courses, day hiking, aerobics, weight training and soccer;
- Declining participation in tennis, curling, bowling, baseball/softball, hunting, fishing, football, cross-country skiing, ice skating, ice hockey, and racquetball;
- Increasing involvement of women in recreation is driving the need for less competitive more personally gratifying activities that offer socialization and balance from family responsibilities;
- The number one preferred activity since 1981 is walking.

Unstructured Recreation Facilities/Spaces and Non-facility Recreation

The changing preferences towards more unstructured recreation activities and more extensive use of outdoor and open-space recreation will increase demand for public parks and trails.

Facility-based Recreation

Many of the public recreation facilities in Alberta were built over 20 years ago and are requiring expensive maintenance, and redevelopment to meet environmental and safety standards. Some are beyond repair and are being decommissioned. In addition, these older facilities were designed to accommodate child and youth programs and are not suited to meeting the needs of the more diverse population. The need for cost efficiency and sustainability is changing the nature of public recreation buildings. Some of the changes include:

- “Community-hubs”- multi-purpose spaces that are blend of different types of recreation, services, and community resources and meet several personal and family needs in one location;
- “Recreation Destinations” that provide the traditional recreation amenities along with retail and entertainment options such as cinemas and grocery stores;
- Integrated health and recreation facilities;
- Facilities that include additional revenue-generating spaces such as ATM’s, equipment shops, and food and beverage services;
- Private-public partnerships and private group provision of recreation;
- Multi-agency cooperation and collaboration in meeting community service needs, including recreation;
- A “business model” approach to recreation service provision based on a continuing predominance of a market orientation of the recreation industry.

Environmental Factors and Considerations

The Canada West Foundation's survey *Looking West 2004* found that two-thirds of Albertans (more than in any other western province) consider the environment to be a top priority. There is growing concern about the health of the natural environment, habitat loss, and water quality and supply issues in the province. There is increased interest in protecting and preserving natural areas in urban centers, as well as working and wild landscapes in rural Alberta. Access to the natural environment and enhancement of outdoor recreation opportunities are increasingly being seen as essential components of quality of life and are expected to play a greater role in the future. Moreover, there is a growing interest in the protection and enhancement of Alberta's urban natural capital as well as its countryside landscapes. Recent surveys have consistently found that Albertans strongly support the maintenance of the province's outstanding natural environment and wish to see continuing government action to ensure this. The natural environment is not simply a part of the economic capital of the province, but an essential foundation for the quality of life of its people. Sustainable development, implying protection as well as use, is a central component of the *Alberta Advantage*.

Economic and Political Factors

The development and delivery of public recreation opportunities in Alberta is determined by the federal, provincial and municipal funding structure. Availability of resources directly impacts the type and nature of recreation opportunities provided, the level and quality of service and the human resources that are allocated.

In 2002, an in-depth study titled *The Public Financing of Recreation and Culture in Alberta: An Historic Review* examined the complexity of the funding structure and outlined the following:

The Federal Government Contribution

The Government of Canada's actual outlay for recreation is difficult to determine because the available data does not separate recreation spending in Alberta as an individual item. However, overall expenditure levels when adjusted for cost escalation and population growth indicates that the real per capita expenditures declined by 17% since 1992.

National infrastructure programs that provide cost sharing with provincial and municipal governments now focus on essential gray infrastructure and environmental improvements such as roads and transportation, water quality, wastewater, and solid waste projects. Recreation infrastructure projects while eligible are included in a lower-priority category.

The Provincial Government Contribution

The Provincial contribution to public recreation is largely through the Alberta Lottery Fund and Alberta Community Development. The real funding levels when adjusted for inflation and population growth show a decline of 40% over the last decade. In addition, annual funding levels fluctuate which affects long range operational and capital planning of recreation services.

The Municipal Government Contribution

Municipalities have assumed an increasing role in the provision of public recreation services in Alberta. Provincial contributions amount to 5% of the cost while 95% of total recreation spending is from property taxes and user fees. User fees have increased by 90% over the decade and further increases may seriously limit accessibility for some citizens in the future. The growing dependence on local funding, declining capital transfers and increasing infrastructure and energy costs are threatening the feasibility and sustainability of community recreation services. Recreation is increasingly being amalgamated with other community services and there is no available data about the number of municipalities that have formal recreation boards or paid recreation service delivery staff. The increasing role of municipal governments in the delivery of recreation services in the 1990s and the relative roles of the provincial versus municipal governments was explored in the report from Phase One of this project which is available for those who wish to examine this matter further.

The Contribution of the Not-for-Profit Sector

Currently, there are 73 Provincial Sport Associations and 25 Provincial Recreation Associations in Alberta that are formally recognized by the provincial government. These non-profit organizations act as governing and support bodies for hundreds of clubs and associations throughout the province. They are not-for-profit organizations and derive their funding from member fees, the Alberta Sport, Recreation, Parks, and Wildlife Foundation, through donations and fund raising activities, and through the sale of products and services. There has been a shift towards 'project' funding with flat-lined core funding that restricts long range planning and the viability and sustainability of many organizations particularly smaller ones. There is rising competition for charity dollars and volunteers to maintain services. Volunteer and staff turnover and burnout are serious issues for many community non-profit groups.

Private Sector Contribution

The private sector is playing an expanding role in the provision of recreation services in Alberta. Private companies are engaged in wellness and health and fitness services where user fees can generate profitable return on investment. Private organizations and business are also involved in partnership agreements for the design, construction and operation of public recreation facilities. Cost-benefit analyses are being used to determine the most viable business model that can be developed to keep costs manageable while maintaining public access and user affordability.

Rising Costs of Delivering Recreation Services

Escalating energy costs, the aging of public infrastructure including roads, water and waste water systems, and public buildings such as schools, hospitals and recreation facilities are putting increasing pressure on local, municipal and provincial budgets. In addition, risk management issues are escalating insurance costs and altering how and what recreation services can be provided.

Link Between Active Recreation and Health

The rising cost of health care and the aging of the population are stimulating a re-examination of the link between physical activity and health. The Capital Health Region survey conducted in 2002, reported that 60% of adults in the Edmonton health region are physically inactive, increasing their risk for coronary artery disease, stroke, high blood pressure, colon cancer and other health problems. Obesity in both the child and adult population is increasing and the incidence of diabetes is on the rise. One hour of exercise per day is recommended and, for many, this is a challenge. Physical education is now being re-instituted in the school curriculum and work-place wellness programs are being developed to help Albertans build exercise into their daily life. In the future greater emphasis will be placed on getting Albertans healthy and keeping them healthy. Recreation opportunities and new initiatives will need to be developed in order to help Albertans achieve the health benefits of an active lifestyle.

The link between active recreation and health highlights a broader consideration, namely: barriers, or constraints, to participation in recreation.

Barriers To Recreation Participation

The Alberta Recreation Survey conducted every four years since 1981 has identified trends among barriers or constraints that Albertans believe restrict their participation in recreation activities. In the 2004 survey the following barriers were identified:

- The costs of admission fees and equipment and supplies are the most important barriers;
- Economic barriers (including work commitments) have replaced time commitments associated with family as the leading barriers;
- There is evidence of the growing importance of the quality of facility maintenance as a limitation on participation;
- Demographic factors affect the importance of barriers with seniors giving the most importance to access issues such as transportation while young adults give more importance to cost factors.

Demographic characteristics namely age, education, income and the type of household, influence the perception of barriers. Albertans facing economic difficulties had stronger perceptions of barriers and single parent families faced both economic and time barriers. For working singles and couples without children overcrowding of facilities and time factors were seen as limiting participation.

Changes in the perception of barriers influences participation levels, and therefore, alters the apparent demand for recreation services. The changing demographics and economic factors will influence the nature of recreation programs and the need for innovation in the delivery of recreation services in the province.

Tourism

Alberta's increased investment in tourism marketing and development will showcase the recreation opportunities in the province to the world. It will increase usage of public recreation facilities and areas such as parks and trails and stimulate commercial recreation development on private and public land in the future. In order to maximize the opportunities and avoid over-crowding and over-use of popular destinations new initiatives will need to be developed across Alberta.

The Provincial Labour Market

In July 2004, Alberta reported a province-wide unemployment rate of 4.7%, which was well below the national average of 7.2% and below the 2003 Alberta average of 5.1%. A drop in rate occurs when the demand for labour exceeds supply and the labour market is considered tight when the rate drops below 5%. At this lower rate there are unfilled job openings, increased pressure on wages and rising competition for workers. Regional, occupational and sector specific unemployment rates vary and labour shortages can occur even at higher provincial rates. Overall, specific skill and occupational shortages are becoming more widespread and severe, and are expected to continue.

Labour Demand

Strong growth in the demand for labour is a result of the robust Alberta economy, increasing global competition for skilled labour, technological changes and demographics.

As in other provinces, Alberta's working-age population is increasingly made up of older individuals and this will significantly impact labour supply. During the past decade, the population aged 45 to 64, the oldest working-age group, soared 51%, and is projected to gain another 38% by 2011. As this group enters retirement and there are fewer younger workers to replace them, imbalances in the labour market will result. Qualified labour shortages will vary in each occupation, sector and region based on the current age of the working population and the sectors' and regions' ability to attract, retain and develop its human resources.

Labour Supply

There are four potential sources of new labour in Alberta: underutilized segments of the population, such as Aboriginal persons, youth, older workers, and persons with disabilities; younger and retrained adults entering through the education system; migration from other provinces within Canada; and immigration. Eliminating employment barriers that prevent the entrance of skilled workers into the province and developing education and training programs that can adjust to the changing needs and capitalize on existing labour pools are critical factors in ensuring future labour supply.

Increased Competition

Competition for skilled labour begins with the recruitment to education and training programs. Advances in career counseling now allow prospective students to analyze future job markets and compare wages and working conditions. With the rising cost of post-secondary education, career decisions are now based on the potential for return on investment, and employability of graduates. Cultural biases that favour "cutting edge" careers, changing parental and student expectations, and the availability of employment targeted programs are influencing career paths. Alberta's strong economy is also luring young people to high-paying jobs straight out of high school.

The increase in competition for the limited supply of human capital is encouraging innovation in recruitment strategies. Some large companies such as Dell Canada are addressing labour shortages by partnering with educational institutions to deliver company-specific training programs. The Capital Health Authority, Grant MacEwan College and NAIT recently joined forces to offer a Health Sciences Career Camp to attract high-school students to the health care field. In the North, the Horizon mega-project is building its own airport capable of landing Boeing 737s in order to fly in its workforce and they also have recruiters in countries around the world pursuing skilled labour. Human Resources and Skills Development Canada (HRSDC) is investing in a \$12 million, three year, multi-media campaign to promote skilled trades ranging from chefs, to florists, to electricians.

Competition even between occupations within the same industry is increasing and transferable skills are becoming even more important in the job market. Not-for-profit organizations and the public sector will have difficulty attracting and retaining employees in this more competitive labour market. Structural issues such as rural or geographic location, and disparities in wages and benefits will also create regional and occupational shortages.

Recreation - The Hidden Workforce

The extent to which the recreation industry will experience serious future skilled labour shortages will depend on a number of factors. Of primary importance is this industry's ability to forecast its potential growth and its true labour requirements.

Recreation is a difficult industry to define because it means different things to different people. It is a blend of public, private-sector businesses and voluntary not-for-profit organizations, falls within the jurisdiction of federal, provincial and municipal governments and overlaps with and is imbedded in other industries such as tourism, health, education, public administration and community planning and services. Forecasting future labour shortages in the industry is further complicated by the fact that the National Occupation Codes (NOC) and the North American Industrial Classification System (NAICS) used to track labour growth, group recreation with a variety of other industries such as communication, amusement and casino operations. Therefore, identifying changing demand and projecting labour shortages for the recreation industry is far more difficult.

Compounding the issue is the fact that the public and non-profit providers of recreation rely heavily on volunteer labour, which is not tracked in labour market studies. This distorts the true manpower and training needs of the industry. As more women enter the job market, the need for eldercare increases and time becomes even more limited the lack of volunteer labour is expected to have an impact on the delivery of service.

Factors that will Influence the Recreation Industry Labour Market

The survey and the in-depth interviews sought to identify the factors that are expected to influence the recreation industry's labour market during the forthcoming five to ten years.

An unaided, open-ended question was employed in the survey to address this issue. The following table, Table 2.1 shows the opinion of respondents in the identified industry segments about the key influences for the next five to ten years. The table shows the dual emphasis the respondents placed on the challenges of increasing demand and positioning, and on finding and affording the resources to accommodate it.

These issues are examined in further depth in Sections IV through VIII of this report, which address trends and opinions in each of the individual industry segments.

Table 2.1 – Key Factors of Influence for the Future of the Recreation Industry

Influences for the Next 5-10 years	Recreation Industry Grouping						Overall % of responses	n=
	Fitness, Active Living, Health Promotion	Amateur Sport	Outdoor recreation, Parks	Community Recreation	Education, Professional Services			
	% of responses	% of responses	% of responses	% of responses	% of responses	% of responses		
Availability of appropriate funding; operating revenue	12.2%	59.0%	26.7%	32.2%	21.9%	30.8%	113	
Demand changes; industry trends; demographics	36.7%	23.1%	28.9%	30.7%	31.3%	30.5%	112	
Competitive wages, hiring; HR shortage	16.3%	17.9%	15.6%	18.8%	18.8%	18.0%	66	
Positioning recreation politically, competitively	26.5%	20.5%	17.8%	13.4%	9.4%	16.1%	59	
Appropriate education, training; supply of trained employees	18.4%	2.6%	8.9%	16.8%	21.9%	15.0%	55	
Aging infrastructure; availability of infrastructure		10.3%	15.6%	16.8%	15.6%	13.6%	50	
Vision and reality of rec. as a career choice	14.3%	5.1%		12.4%	21.9%	11.2%	41	
Gov't, public focus on fitness, rec, sport; rec. vs. health	26.5%	2.6%	4.4%	10.4%	9.4%	10.9%	40	
Increased op. costs; other costs (e.g., risk, insurance)	6.1%	5.1%	20.0%	10.4%	3.1%	9.8%	36	
Attrition; retirement leading to lost expertise, leadership	4.1%	5.1%	8.9%	8.9%	15.6%	8.4%	31	
Gov't, public focus on fitness, recreation, and sport	12.2%	12.8%		6.9%	18.8%	8.4%	31	
Innovative strategies and alliances	4.1%	5.1%	2.2%	4.0%		3.5%	13	
Flexibility, awareness of working conditions; retention		2.6%	2.2%	3.5%	3.1%	2.7%	10	
Certification	6.1%		4.4%	0.5%	6.3%	2.2%	8	
Availability of rec ed opportunities; declining enrolment				3.5%		1.9%	7	
Expectation of graduates for career progression	2.0%		2.2%	1.5%	3.1%	1.6%	6	
Integrated position of recreation and community development				2.5%		1.4%	5	
Time pressures; employees' personal priorities		2.6%	2.2%	1.0%	3.1%	1.4%	5	
Sustainability of NFP rec. organizations	2.0%	2.6%	2.2%	1.0%		1.4%	5	
Diminshing volunteer resources		2.6%		1.0%	3.1%	1.1%	4	
The benefit equation				0.5%		0.3%	1	

**As respondents were permitted multiple responses, totals will exceed 100%*

Table 2.2 compares the responses of employees and employers to these questions.

Both groups of respondents point to funding and the recreation industry marketplace as the most important factors. The active effort on the part of the ARPA and the industry to implement a strategic plan focused on building industry strength and direction will contribute to resolving several of the key challenges identified.

As well, little change in the distribution of responses Table 2.2 resulted from an analysis of the responses of those respondents possessing a formal recreation industry qualification. Further, analysis of these influences from the perspective of different types of employer also yielded a similar distribution.

Table 2.3, analyzing the “top five” influences, revealed some interesting differences in the views of these factors between the different types of organizations that are involved in delivering recreation services.

The “Not for Profits” and “Education, Health, and Community Services” appear to be significantly more concerned about funding and revenue than the government players, while the private sector respondents are significantly less concerned. Caution should be used in connection with these data due to the small number of respondents included in some groups in the analysis.

Overall, however, the similarity in responses indicates that the industry agrees that these are, indeed, the key factors of influence.

The third most important influence was positioning recreation politically and competitively. This is a reflection of the identity challenge facing the industry due to constant pressure upon it to evolve to accommodate external trends and relationships with related mandates such as health, culture, and tourism. Yet, it is not always the recreation industry that needs to adapt. Perhaps the industry needs to create a foundation of beliefs and values that will induce other sectors to view it as an important potential partner, and not simply assume that recreation will adapt to their needs.

Table 2.2 – Influences Shaping the Recreation Industry

Influences for the Next 5-10 years		Employers/Employees		Overall
		Employees	Employers	
	Availability of appropriate funding; operating revenue	33.3%	29.4%	30.8%
	Demand changes; industry trends; demographics	25.8%	33.2%	30.5%
	Competitive wages, hiring; HR shortage	12.9%	20.9%	18.0%
	Positioning recreation politically, competitively	14.4%	17.0%	16.1%
	Appropriate education, training; supply of trained employees	15.2%	14.9%	15.0%
	Aging infrastructure; availability of infrastructure	9.1%	16.2%	13.6%
	Vision and reality of rec. as a career choice	18.9%	6.8%	11.2%
	Gov't, public focus on fitness, rec, sport; rec. v.s. health	14.4%	8.9%	10.9%
	Increased op. costs; other costs (e.g., risk, insurance)	9.8%	9.8%	9.8%
	Attrition; retirement leading to lost expertise, leadership	8.3%	8.5%	8.4%
	Gov't, public focus on fitness, recreation, and sport	5.3%	10.2%	8.4%
	Innovative strategies and alliances	6.1%	2.1%	3.5%
	Flexibility, awareness of working conditions; retention	3.8%	2.1%	2.7%
	Certification	3.8%	1.3%	2.2%
	Availability of rec ed opportunities; declining enrolment	2.3%	1.7%	1.9%
	Expectation of graduates for career progression	.8%	2.1%	1.6%
	Integrated position of recreation and community development	1.5%	1.3%	1.4%
	Time pressures; employees' personal priorities	3.0%	.4%	1.4%
	Sustainability of NFP rec. organizations	.8%	1.7%	1.4%
	Diminishing volunteer resources	1.5%	.9%	1.1%
	The benefit equation	.8%		.3%
Overall	N=	132	235	367
		191.7%	189.4%	190.2%

**As respondents were permitted multiple responses, totals will exceed 100%*

Table 2.3 – Key Influences by Type of Employer

	Organization Category				Overall
	Private sector	Not for profit	Government	Education, health, community svcs	
	%	%	%	%	
Availability of appropriate funding; operating revenue	13.0	35.4	30.2	37.5	30.9
Demand changes; industry trends; demographics	26.1	24.1	31.0	43.8	30.3
Competitive wages, hiring; HR shortage	21.7	27.8	15.1	12.5	18.0
Positioning recreation politically, competitively	13.0	20.3	14.2	21.9	16.1
Appropriate education, training; supply of trained employees	21.7	16.5	13.4	18.8	15.0
	169.6	191.1	189.7	206.3	190.2
N=	23.0	79.0	232.0	32.0	366.0

** As respondents were permitted multiple responses, totals will exceed 100%*

The demand for the services that are provided by recreation professionals and specialists is increasing in response to changing demographics (e.g., the influence of the baby boomers), population growth, priorities for healthy and active lifestyles, aging infrastructure, and many other factors.

Employees noted the importance of clarifying the vision and reality of recreation as a career choice. This must be a priority to stimulate increasing enrollment in recreation education and to position the recreation industry as a credible employer. The employees ranked this issue as a significantly higher priority than the industry's challenge with providing competitive wages.

The focus groups with students revealed that a significant proportion of them had joined their recreation education programs "to make a difference" or "to promote a healthy lifestyle". Others joined because they like recreation activities. However, many joined these programs simply "because could get into the program".

The employers ranked the challenge of providing appropriate education and training and ensuring a well prepared labour force supply as a key influence for the future. Given the highly competitive labour market conditions in which the recreation industry must attract employees, it is clear that the industry must provide competitive wages, working conditions, professional development, and career progression and mobility options.

Both employees and employers agreed with trends addressed in the Phase Two report, noting the influence of the increasing focus of government and the population on maintaining a healthy lifestyle. As this emphasis increases, the demand for recreation professionals and practitioners will increase correspondingly. The research shows that survey respondents and industry experts in each of the four primary industry segments believe that the number of jobs in the recreation industry will continue to increase.

It should be noted that the factors respondents believe will influence the future often also reflect an expression of what they currently see as burning issues.

Section III. Labour Market Conditions

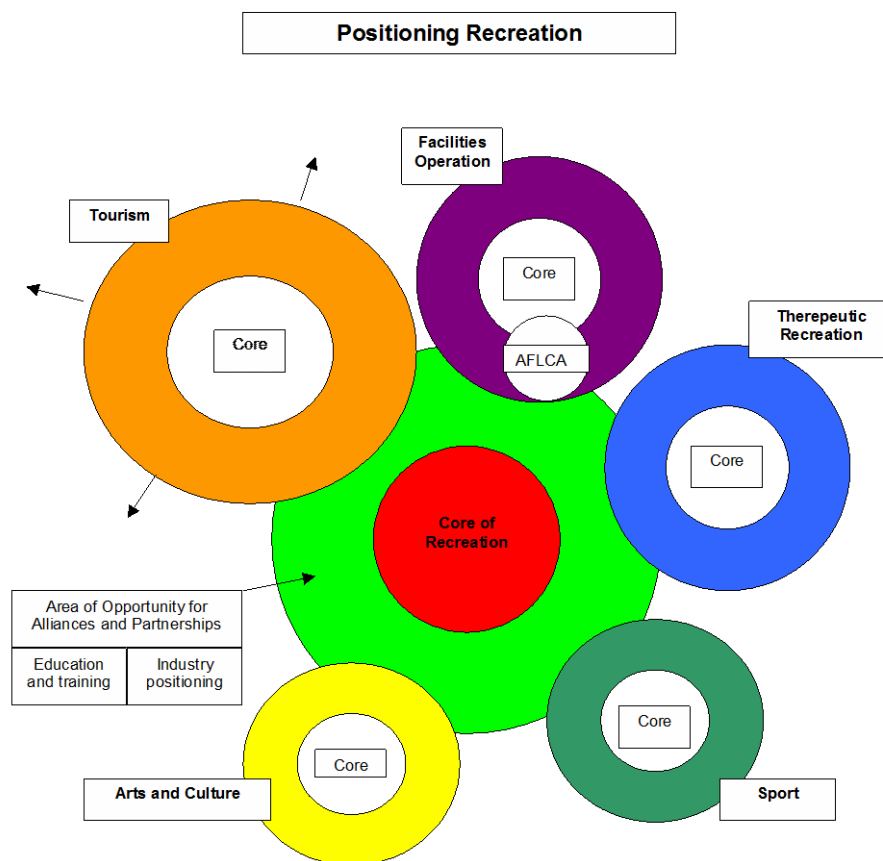
Recreation Industry Labour Market Analysis

Positioning Recreation

While most people comprehend the value of a healthy and active lifestyle, the view of many about recreation as an industry is indistinct due to overlapping mandates with other industries. The continuing evolution of the industry is one of its strengths, but leads to challenges of identity.

This identity challenge affects the labour market as related mandates are often better funded but pursue recruitment of recreation employees, partly because they deliver recreation programming as part of their mandate. The recreation industry is pursuing strategies to develop a clear identity and positioning for recreation with the related mandates. Figure 1 illustrates the positioning of the recreation industry with respect to other mandates.

Figure 1 – Interaction Between Recreation and Related Mandates



The core of recreation, in the centre of the diagram, represents an understanding – theoretically, philosophically, and operationally – of the importance of leisure and leisure behaviour to personal and community development. As well, it represents the fundamental skills, knowledge and attitudes required in the recreation industry. This study suggests that this core is comprised of skills such as programming, planning, leadership and management or knowledge of human behaviour, diversity, and fitness. This core is represented in virtually all sectors of the recreation industry and defines its particular core competencies, and thus defines the overlap of each sub sector of the industry on the diagram. However, specialty areas such as tourism and sport, have developed relevant skill and knowledge sets required within their own mandate.

The research indicates that because the core competencies are shared by several mandates, these related mandates should be involved in defining recreation education and training. The core competencies summarized above are a link that defines the recreation-focused components of several related industries.

Further, as specialty areas in recreation have evolved, they have developed independent identities. The common core needs to be identified, developed and promoted to create a stronger identity and effective role clarification within the recreation industry.

Recreation Industry Employment Profile

Current Trends

Employers are concerned that there is a decreasing supply of labour to meet the needs of the industry as a result of competition from other industries that are better positioned politically, competitively, and economically. With its current structure, the recreation industry will face increasing internal and external forces threatening its long-term viability.

Demand and Supply of Employees

The survey and the industry interviews reveal human resources challenges for employers. They have difficulty recruiting qualified applicants to positions, significantly due to their inability to pay competitive wages and benefits, and labour market competition for employees. High costs of training and high turnover rates also influence operations.

In management areas, attrition rates appear to be within acceptable ranges. However, the survey shows they are judged to be too high in program related areas and retail and clerical positions. In these areas the employers reported they replace staff too frequently.

Distribution of the Labour Force

Two thirds of the organizations employ programmers and “other recreation jobs”. Approximately 40% employ skilled trades or operators, administrators, and leaders/interpreters.

The industry uses large numbers of volunteers. In fact, interviews conducted with several not-for-profit organizations indicated that their volunteer workforce very significantly supports these organizations. Employees and employers noted in an unaided question in the survey that working with volunteers is an important skill to be targeted for enhancement. The 2004 Alberta Recreation Survey notes the 41% of the survey respondents have volunteered in culture, recreation, sports, or parks in the past 12 months.

Often, it can be challenging to attract volunteers to undertake professional development training in recreation. Normally their work is very focused and specific to their individual mandate. Further, in many organizations there is usually not the funding available to pay for volunteer training.

Rates of Pay and Benefits

The research included an analysis of the rates of pay most commonly paid by the selected industry segments. Analysis of the survey data and the opinions of industry experts indicate that rates of pay are often not sufficiently competitive to continue to attract the calibre of employees expected by the industry. Not surprisingly, the data show higher pay scales in most of the selected occupations among government employers compared with not for profit employers. Employees working in rural Alberta are paid consistently less than their urban market counterparts.

Where the survey respondent holds a formal recreation qualification or certification the pay scales are higher in several occupations. The data also confirm that employees in organizations serving urban markets are paid more than those serving rural markets. More detail on the wage rates of individual occupations can be located in the position descriptions obtained from the Job Content Analysis discussed later in this Section, and contained in an appendix to this report.

Nature of Employment Contracts

The research shows a changing landscape in the workplace. Employers were asked to identify the changes and other trends they have observed in their organizations as they have addressed challenges in recent years. A large proportion of the respondents (56%) reported their organization had increased its number of part time or casual positions and 40% reported increased numbers of full time positions.

This indicates that demand for employees is already increasing in response to increasing demand for services. Increasing demand for recreation services allied with budgetary constraint has led to efficiency-driven human resources strategies.

The survey data also show, however, that the responding organizations are experiencing difficulty in attracting new staff (35%). Unpaid overtime (32%) and turnover (29%) are both increasing, and there is increased use of contracted employees or job sharing and an increasing reliance on volunteers.

Competition for Resources

The research shows that employees with formal recreation education or training are well positioned for promotion to jobs outside the recreation industry. In an unaided, open-ended question in the survey, the respondents indicated that the vision of recreation as a career limits recruitment and results significantly from the industry's ability to pay competitive wages. However, the increasing concern for risk management indicates the importance of hiring appropriately qualified employees.

Content Analysis of Job Postings in Alberta's Recreation Industry

Overview

The labour market is a key source of information for education planning. If recreation educators want to ensure that program offerings are supplying graduates with the necessary skills, knowledge and attributes required of the job market, they need information on what jobs are in demand, and what competencies are required within them.

This summary contains the results of an investigation into occupations in the recreation industry in the province of Alberta. In total, over 200 job postings in the recreation industry were analyzed. The job postings were obtained from a variety of sources including the PERC bulletins (Professional Environmental Recreation Consultants), the ARPA on-line job posting, and others (see appendix for full listing). The purpose of this inquiry was to:

- Identify current positions in demand within the recreation industry, and
- Develop occupational profiles for positions not currently included in the Recreation, Culture and Entertainment category of the Alberta Learning Information System (ALIS).

The occupational profiles outline formal education and training required by practitioners/professionals in Alberta in different occupations and assess core competencies and critical skill requirements of each.

The investigation identified a total of 33 additional jobs in recreation that are not listed in the Alberta Learning Information System (ALIS) occupational profile for Information, Culture and Recreation. Draft occupational profiles are included in Appendix 1 of this report. The occupational profiles have been developed for the following positions in recreation:

Community Development Practitioner	Director of Community Services
Youth Program Coordinator	Recreation Director
Youth Centre Manager	Marketing Coordinator
Fitness/Wellness Program Coordinator	Lifeguard
Recreation Programmer	Head Lifeguard
Recreation Programmer – Older Adults	Aquatics Supervisor/Manager
Recreation Programmer – Aboriginal	Golf Course Manager
Recreation Programmer – Aquatics	Theatre Manager
Volunteer Coordinator	Heritage and Museum Coordinator
Recreation Activity Leader	Heritage Programmer
Campus Recreation/Intramural Coordinator	Arts and Culture Development Officer
Recreation Therapist	Recreation Facility Manager
Athletic/Games Program Director	Arena Manager
Camp Coordinator	Parks Technician
Youth Camp Counselor	Parks Planner
Special Event Coordinator	Fitness Instructor
College or University Instructor/Professor	

Content analysis of job postings resulted in observations about jobs within the recreation industry. Some of the overall observations include:

- Demand for skill sets specific to recreation

The labour market is demanding skill sets specific to recreation such as programming, activity leadership, event coordination, project management, facility management, lifesaving, recreation therapy, community development and interpretation.

- Demand for management and marketing skill sets

Many job postings in recreation require individuals with higher-level management skills such as organizational leadership, strategic planning, research, marketing, policy and planning, finance, and human resource management.

- Demand for diploma and degree graduates

Overall, the majority of job postings seek individuals with post secondary education at the diploma and degree level in recreation administration, physical education, business, education and related disciplines.

- Demand for additional certifications

Numerous job postings in recreation require certifications beyond educational preparation in areas such as lifesaving, facility management, special event management, coaching and interpretation.

- Demand for customer service skills

A number of job postings require individuals to have strong customer service skills especially in positions where individuals are working directly with participants, or within management capacity.

- Demand for “emotional intelligence” or “soft skills”

The majority of job postings require individuals with high emotional intelligence or soft skills, defined as strong interpersonal skills and an ability to work effectively with others. Many job postings referred to personal characteristics more than other qualifications.

- Demand for strategic thinking

A number of job postings were seeking individuals to engage in critical thinking, problem solving and set strategic direction. Similarly, evidence of entrepreneurial spirit and innovation were expected in postings, particularly at the mid and upper management levels.

Labour Force Characteristics

The following paragraphs describe the characteristics of the recreation industry’s labour force.

Employment Demographics

Table 3.1 summarizes the distribution of age, gender, and annual income of the respondents by industry segment.

Overall, the respondents were well distributed in each age category with slight variations such as a younger population in the fitness, active living, and health promotion segment and older in outdoor recreation and parks. More detailed analysis shows a higher proportion of early career respondents in the not for profit and government sectors.

With respect to gender, overall 61% of respondents were female and 39% were male. However, Table 3.1 shows significant differences in the gender balance reported among the segments. Only the outdoor recreation and parks respondents showed higher propensity to be male. Most of the respondents in fitness, active living, and health promotion were female.

There are apparent differences between the annual income of individuals within the sectors of the recreation industry. In general, respondents report higher levels of income moving from the private sector, to not for profit, government and then education, health and community services. Community recreation employees reported higher incomes from their primary recreation industry job than those in other segments. A larger proportion of fitness and active living respondents reported lower incomes. This analysis suggests that employees within the public sector are paid higher than those in the recreation industry’s private sector.

Table 3.1 Respondent Demographics

Respondent Demographics			Recreation Industry Grouping					Total
			Fitness, Active Living, Health Promotion	Amateur Sport	Outdoor recreation, Parks	Community Recreation	Education, Professional Services	
Age category of respondent	Under 20 years	Col %	2.4%	3.1%				.7%
	20 to 24 years	Col %	4.9%	6.3%		2.9%		3.0%
	25 to 29 years	Col %	26.8%	6.3%	8.1%		12.5%	12.2%
	30 to 34 years	Col %	7.3%	18.8%	8.1%	24.7%	20.8%	19.4%
	35 to 39 years	Col %	14.6%	15.6%	10.8%	17.1%	16.7%	15.8%
	40 to 44 years	Col %	12.2%	25.0%	13.5%	16.5%	8.3%	15.8%
	45 to 49 years	Col %	12.2%	18.8%	16.2%	11.8%	20.8%	13.8%
	50 to 54 years	Col %	14.6%	6.3%	18.9%	11.2%	20.8%	12.8%
	55 to 59 years	Col %	4.9%		13.5%	2.9%		3.9%
60 to 64 years	Col %			10.8%	2.4%		2.6%	
Total	Valid N		N=41	N=32	N=37	N=170	N=24	N=304
Gender of respondent	Male	Col %	9.8%	39.4%	61.1%	39.6%	45.8%	38.6%
	Female	Col %	90.2%	60.6%	38.9%	60.4%	54.2%	61.4%
Respondent's total annual personal income from primary recreation industry job	Below \$20,000	Col %	22.5%	13.3%	11.8%	6.5%	8.7%	10.1%
	\$20,000 to 39,999	Col %	30.0%	26.7%	29.4%	26.6%	26.1%	27.4%
	\$40,000 to 59,999	Col %	35.0%	50.0%	26.5%	42.6%	30.4%	39.5%
	\$60,000 to 79,999	Col %	5.0%	6.7%	23.5%	15.4%	17.4%	14.2%
	\$80,000 to 99,999	Col %	5.0%		5.9%	6.5%	17.4%	6.4%
	\$100,000 or more	Col %	2.5%	3.3%	2.9%	2.4%		2.4%

More detailed analysis not shown in the table suggests that respondents in organizations serving urban markets tend to be older than those in organizations serving rural markets. They have a higher propensity to be male and have significantly higher incomes.

Differences are noted also between those holding a formal recreation qualification and those who do not. Those who have completed formal recreation education or training appear to be younger and display a higher propensity than other respondents to have annual income from their primary recreation job in the range of \$40,000 to \$79,999.

The interviews with industry experts suggest that many employees with recreation education – especially, though not exclusively, within the public sector - may have been promoted out of the field of recreation. The industry experts agreed that recreation graduates are well prepared with skills and knowledge that position them well as candidates for senior jobs in other fields. This may explain their younger profile and lower incidence in the higher income categories. However, this phenomenon may also be explained by the fact that many of the employers who responded to the survey are senior executives with recreation departments reporting to them.

Education and Training

The following paragraphs describe the education and training profile of the respondents.

Education and Training Profile

The surveys addressed the level of education and training achieved by the respondents. Table 3.2 summarizes, by industry segment, the level of education achieved by the respondents.

Overall, the current recreation labour market appears to be well educated. Post secondary degree graduates are consistently represented as the highest proportion of respondents in all sectors. Approximately 49% of respondents have obtained a post secondary degree, and 15% have obtained a post secondary diploma. In all but the private sector, a higher proportion of respondents reported having a formal recreation qualification or certification than not.

Table 3.2 – Respondents’ Personal Education Profile

Respondents' personal education profile			Recreation Industry Grouping					Total
			Fitness, Active Living, Health Promotion	Amateur Sport	Outdoor recreation, Parks	Community Recreation	Education, Professional Services	
Highest level of education completed	Some high school	Col %	2.4%				.6%	.6%
	High school diploma	Col %	2.4%	8.6%	16.7%	10.1%	7.7%	9.4%
	Certification from a	Col %	2.4%		11.1%	6.1%	3.8%	5.3%
	Post secondary certificate	Col %	9.5%	11.4%	11.1%	6.7%	7.7%	8.2%
	Post secondary diploma	Col %	11.9%	8.6%	11.1%	19.0%	3.8%	14.8%
	Apprenticeship	Col %		2.9%	5.6%	1.1%		1.6%
	Post secondary degree	Col %	59.5%	54.3%	30.6%	50.8%	38.5%	49.1%
Formal recreation qualification or certification	Graduate degree	Col %	11.9%	14.3%	13.9%	5.6%	38.5%	11.0%
	Yes	Col %	66.7%	54.3%	26.3%	62.0%	69.2%	58.2%
	No	Col %	33.3%	45.7%	73.7%	38.0%	30.8%	41.8%
Total	Valid N		N=42	N=35	N=38	N=184	N=26	N=325

Overall, approximately 48% of the respondents with a formal recreation qualification or certification had obtained a post secondary degree in recreation, while 20% each reported they had obtained a diploma, or certification by an industry association. Private sector education was negligible.

The respondents report an average of 10 or more years of experience after graduation, consistent with their level of seniority.

Requirement for Qualifications

Several organizations require or expect specific levels of education or types of certification for their employees. Notably certification is required in areas of high risk or in certain professional areas.

Table 3.3 summarizes this requirement from the survey response. A more detailed list of requirements and expectations by occupation is included in the occupational profiles in the appendix.

Table 3.3 – Required Qualification or Certification

Primary Type of Qualification or Certification Required	Incidence	% of respondents
None	68	21.3
Recreation or closely related degree	67	20.9
Undergraduate degree appropriate to mission	50	15.6
Lifesaving and related certifications	47	14.7
Diploma in recreation or related subject	29	9.1
Leadership Certification	12	3.8
Facility operation or trade certification	10	3.1
Certification in relevant recreation technologies	7	2.2
Local Government Administration	7	2.2
Relevant Experience	6	1.9
Post Graduate degree	6	1.9
Grade 12	4	1.3
First aid	3	0.9
ARFP or Other industry certification	4	1.3
Total	320	100

The survey shows that respondents who possess a formal recreation qualification or certification found this helped them secure their job.

The employers were asked through the survey to rate their satisfaction with the extent to which recreation education and training programs prepared graduates of those programs to meet their needs. Employers also showed general satisfaction with certification programs provided by the recreation industry. They rated their satisfaction highest with respect to graduate degrees (mean rating of 2.45 on a four point scale where 1 means “not at all satisfied” and 4 means “very satisfied”), followed by post secondary degrees (mean rating 2.37) and lowest with private institution programs.

Entering and Leaving the Industry

The largest proportion of respondents entered the recreation industry directly following education but are most likely to leave the industry early in their careers. Thus the industry is a training ground and source of employees for other employers. Those working in government jobs were more likely than others to have entered the recreation industry from another public sector job. Not for profit organizations seem to attract employees from high school.

Employees with a recreation education or qualification are significantly more likely than those without to enter the industry after their college or university studies while those without are more likely to join from another public sector job.

Table 3.4 shows that the largest proportion of employees chose to enter the industry due to its positive orientation. Employees perceive the recreation industry as an interesting line of work, conducive to lifestyle, dealing with people positively and in pleasant surroundings.

Table 3.4 – Reasons for Seeking Employment in Recreation

Reasons for seeking employment in recreation (employees) Scale is 1-4, where 1 means "Strongly disagree" and 4 means "Strongly agree"	Formal recreation qualification or certification		Overall
	Yes	No	
	Mean rating	Mean rating	
Wanted an interesting job	3.7	3.6	3.6
Wanted a job that was conducive to my lifestyle	3.4	3.3	3.4
Liked the working conditions	3.4	3.3	3.4
Wanted a job dealing with people	3.4	3.3	3.3
Wanted to work in pleasant surroundings	3.3	3.3	3.3
Wanted a job suited to education	3.4	2.9	3.2
Recreation work fits personal schedule	3.0	3.1	3.0
Wanted to live in this community	2.9	3.1	3.0
Was attracted by the image of recreation	3.0	2.8	2.9
It was easy to get a job in recreation	2.1	2.1	2.1
Wanted to leave previous job	2.0	2.2	2.1
Earned too little in previous job	2.0	2.1	2.0
Easy to start a recreation business	1.9	2.1	2.0
Felt that there were a lot of recreation jobs	2.0	1.9	2.0
Saw recreation as a profitable industry	1.9	1.8	1.9
Limited alternatives in the job market	1.9	1.7	1.8
Wanted to establish own business	1.7	1.7	1.7
Was unemployed and needed a job	1.6	1.6	1.6
Needed extra money quickly	1.4	1.5	1.4
Was let go in previous job	1.1	1.1	1.1
N=	159	88	247

This pattern of motivational choice was consistent in respondents with a formal recreation qualification or certification and those without. Respondents without a formal recreation qualification or certification were more likely to be seeking a job conducive to their lifestyle, suited to their education, to have been attracted by the image of recreation, and to have wanted to live in the community than the recreation qualified respondents. This trend was also noted in the student focus group program.

This may be useful to help market an image of a recreation industry career to candidates.

Recruitment

The following analysis compares recruitment and retention strategies by type of employer.

Employers seek to fill vacancies using a combination of approaches. The survey results indicate a fairly consistent response across the segments of the recreation industry and across types of employers. Table 3.5 compares employer and employee strategies by type of employer.

Table 3.5 – Recruitment and Job Search Strategies

		Organization Category				Overall
		Private sector	Not for profit	Government	Education, health, community svcs	
Recruitment strategies	Post in newspapers	100	57.7	88.4	77.8	82.1
	Maintain a job opportunities page on organization's website	75	53.8	66.3	100.0	66.4
	Seek internal candidates	50	61.5	67.4	77.8	66.4
	Post jobs with regional colleges and universities	50	46.2	50.5	77.8	51.5
	Send postings to employment assistance organizations	75	46.2	44.2	33.3	44.8
	Encourage employees to recruit friends	75	50.0	31.6	55.6	38.1
	Use an online job search service or agency	25	30.8	21.1		21.6
	Attend job and career fairs	25	23.1	17.9	33.3	20.1
	Use a professional recruiter or headhunter	25	7.7	9.5		9.0
	n=	4	26	95	9	134
Jobseeking strategies	Checked postings in newspapers	23.1	47.5	43.7	41.2	43.4
	Heard through friends or relatives	53.8	47.5	33.9	41.2	38.2
	Searched job opportunities on websites	38.5	45.8	34.4	47.1	37.9
	Was an internal candidate	15.4	30.5	38.3	52.9	36.4
	Reviewed job postings at regional colleges and universities	23.1	18.6	9.8	52.9	15.1
	Responded to postings at employment assistance organization	15.4	15.3	12.0	5.9	12.5
	Used an online job search service or agency		15.3	6.6	5.9	8.1
	Attended job and career fairs		3.4	3.8	17.6	4.4
	Used a professional recruiter or headhunter	7.7	5.1	3.8		4.0
	n=	13	59	183	17	272

* As respondents were permitted multiple responses, totals will exceed 100%

There is a measure of correlation between the method used by employers to seek employees and the methods used by employees to find jobs.

Government agencies appear more likely to post vacancies in newspapers. Financial constraints may limit other groups from similar recruitment tactics. Not for profit organizations may be more likely to use lower cost strategies such as referrals, job/career fairs, or web-based referral approaches for recruitment. The in-depth interviews suggest challenges exist in recruiting employees for specialized positions.

Employee Retention

Employee retention is an important component of management in every industry. Areas where the most concern was expressed over retention are among programmers, retail clerks or customer service staff, leaders and skilled trades or equipment operators.

The survey identified various retention strategies and asked employers to indicate which they used, and asked employees which they preferred. Table 3.6 shows the retention strategies by industry sector.

Table 3.6 – Retention Strategies

		Recreation Industry Grouping										Total	
		Fitness, Active Living, Health Promotion		Amateur Sport		Outdoor recreation, Parks		Community Recreation		Education, Professional Services		N=	Col %
		N=	Col %	N=	Col %	N=	Col %	N=	Col %	N=	Col %		
Retention strategies	Pay employees according to productivity (pay for performance)	2	14.3%	1	11.1%	3	15.0%	13	14.9%	5	55.6%	24	17.3%
	Provide occasional rewards for outstanding work	4	28.6%	4	44.4%	6	30.0%	29	33.3%	3	33.3%	46	33.1%
	Pay employees wages that are higher than industry standard	3	21.4%	1	11.1%	3	15.0%	21	24.1%	1	11.1%	29	20.9%
	Provide additional benefits (dental, health, pension plan, etc.)	11	78.6%	6	66.7%	10	50.0%	58	66.7%	7	77.8%	92	66.2%
	Provide assistance with difficult-to-locate housing (subsidized, accessible)							3	3.4%			3	2.2%
	Provide pay increases based on seniority	4	28.6%	1	11.1%	5	25.0%	32	36.8%	3	33.3%	45	32.4%
	Promote from within the organization	6	42.9%	2	22.2%	11	55.0%	58	66.7%	5	55.6%	82	59.0%
	Provide a profit sharing plan, bonuses, or shares	1	7.1%	3	33.3%	1	5.0%	3	3.4%	1	11.1%	9	6.5%
	Recognize additional training and certification with reward (pay or recognition)	4	28.6%	1	11.1%	7	35.0%	28	32.2%	3	33.3%	43	30.9%
	Provide training and education opportunities	10	71.4%	5	55.6%	17	85.0%	67	77.0%	7	77.8%	106	76.3%
Employees views of effective strategies	Provide advancement opportunities	5	35.7%	2	22.2%	8	40.0%	34	39.1%	4	44.4%	53	38.1%
	Respondent is business owner	3	7.7%	1	3.0%	2	6.7%	2	1.2%	3	12.5%	11	3.7%
	Very motivated to stay with present employer	18	46.2%	12	36.4%	9	30.0%	81	47.1%	9	37.5%	129	43.3%
	Pay according to my productivity (pay for performance)	10	25.6%	11	33.3%	10	33.3%	57	33.1%	11	45.8%	99	33.2%
	Provide occasional rewards for outstanding work	17	43.6%	19	57.6%	18	60.0%	95	55.2%	12	50.0%	161	54.0%
	Pay me wages that are higher than industry standard	16	41.0%	6	18.2%	7	23.3%	64	37.2%	8	33.3%	101	33.9%
	Provide additional benefits (dental, health, pension plan, etc.)	18	46.2%	19	57.6%	12	40.0%	77	44.8%	9	37.5%	135	45.3%
	Provide pay increases based on seniority	18	46.2%	9	27.3%	4	13.3%	51	29.7%	5	20.8%	87	29.2%
	Promotion to a position with higher authority or responsibilities	15	38.5%	8	24.2%	7	23.3%	64	37.2%	7	29.2%	101	33.9%
	Provide a profit sharing plan, bonuses, or shares	8	20.5%	4	12.1%	4	13.3%	21	12.2%	5	20.8%	42	14.1%
Employees views of effective strategies	Recognize additional training and certification with reward (pay or recognition)	15	38.5%	9	27.3%	10	33.3%	66	38.4%	7	29.2%	107	35.9%
	Provide training and education opportunities	24	61.5%	20	60.6%	15	50.0%	119	69.2%	15	62.5%	193	64.8%
	Provide advancement opportunities	15	38.5%	8	24.2%	12	40.0%	84	48.8%	9	37.5%	128	43.0%
	Provide the opportunity for full time work	10	25.6%	5	15.2%	3	10.0%	28	16.3%	3	12.5%	49	16.4%
	Provide job security	13	33.3%	8	24.2%	6	20.0%	63	36.6%	10	41.7%	100	33.6%
	None of the above: it is time for a change/personal reasons	2	5.1%			2	6.7%	8	4.7%	1	4.2%	13	4.4%

The research shows the importance of training and education and of recognition of employees by promoting from within, providing a good benefits, and acknowledging performance with pay incentives. Employers’ retention strategies are consistent with the expectation of employees. Further, a significant proportion of the employees in all segments indicate they are “very motivated to stay with their employer” and only very few employees reported that they are actively seeking a change in employment.

Job Satisfaction

The large number of employees motivated to stay with their employer is confirmed by their rating of job satisfaction. Employees in the industry are generally satisfied with their career to date.

The table also shows that, in many areas, employees with formal recreation qualification or certification are less satisfied with their job than those without formal recreation preparation. However, they are more satisfied with their benefits and career advancement opportunities. Urban market employees are more satisfied with the job content and some working conditions than are their rural colleagues. Respondents employed by government organizations show a higher propensity to be satisfied with their career.

The general level of satisfaction remains high within the current recreation labour market. Level of challenge is rated higher than overall satisfaction for most industry segments. Respondents are least satisfied with their income potential and the number of recreation jobs available. Within the private sector, employees are not as satisfied with the level of benefits provided, or the quality of jobs available. In the not for profit sector there is additional dissatisfaction with the quality of jobs, and in the education, health and community services sector there is a level of dissatisfaction with the social status of recreation employment.

Investing in Human Resources

Professional Development

The respondents have shown their desire for professional development but explain that their access to it is limited by other priorities, although some organizations do give professional development and continuing education a high priority.

Human Resources Development

The data show that consistently the largest proportion of organizations provides a budget for training and the time for the employee to take advantage of training opportunities. Many also define expected skills and training requirements in job descriptions. Despite the commitment of the organization, personal and business barriers tend to prevent the employees from taking full advantage of professional development.

The types of professional development opportunities that were sought out but not found were: (a) graduate degree; (b) advanced facility management; (c) instructor training; (d) financial management and investment strategies; (e) supervisory/risk management; (f) health courses; (g) grant management; (h) marketing; (i) program development; (j) landscape design; (k) refrigeration and welding; and (l) sales and customer service. The modes of delivery that were sought but not found were conference learning opportunities, short intense courses and on-line courses.

Work Conditions

Consistent with the retention priorities they expressed, most of the respondents have received a salary increase (79%), training opportunities (77%), and/or an increase in responsibility (72%) during their employment. This is not surprising as they are longer-term employees.

The majority of the respondents in the survey (81%) were full time employees on the permanent staff of their organization; 11% were employees who chose to work part time for their own convenience. Overall, 87% of the respondents were on their organization's permanent staff.

Work conditions vary between the different kinds of organization included in the analysis. Overall, 52% regularly work unpaid overtime and 40% regularly work evenings and weekends. Employees in government organizations are the most likely to be paid for their overtime.

Future Employment Sectors and Projections

Employment Sectors and Projections

Employers responding to the survey provided an assessment of the expected change in the number of employees in selected categories during the forthcoming five years. Nearly all organizations reported that they expected significant growth in most areas.

The highest growth rates are expected to be at the delivery or front line level and with skilled trades and equipment operators, consistent with the growth in demand predicted by the survey respondents and the experts with whom in-depth interviews were conducted. Marketing is also expected to grow significantly – perhaps a reaction to the perception that increasing demand and industry trends will call for innovative revenue streams increased and new partnerships and alliances.

Issues and Opportunities

Analysis of the current and future recreation labour market identifies a number of issues and opportunities for the recreation industry in Alberta:

Organizations are concerned about the quantity and quality of the labour supply.

The nature of the labour market is changing in the sense that it is growing in both full- time and part-time positions, but is requiring more unpaid overtime, job sharing and contract positions.

While the industry receives labour supply from a variety of sources, it relies heavily on those just leaving the school or college system. This reliance on one source may require stronger positioning in a more competitive labour market.

The recreation industry is concerned with recruiting enough qualified applicants in the future, yet as a whole, they currently rely on fairly traditional recruitment methods. The industry will need to refine its recruitment strategies and should develop stronger “feeder systems” to continue attracting from its major target market – young individuals.

The industry is quite accessible and there is some upward mobility for employees. However, individuals are exiting the industry in early stages of their career: thus, as previously noted, the recreation industry is a supplier of employees to other sectors.

- Individuals are attracted to recreation work for a variety of positive reasons indicating it is a career of choice. They are deterred from joining or staying in the industry by less than competitive compensation and perceptions of limited career progression opportunities.
- While the majority of recreation employees are very satisfied with recreation employment, the industry can do better when it comes to income levels, job opportunities, quality of employment and perceived social status.
- With decreased formal recreation education alternatives in the province, from which the industry gets the majority of its labour force, future recruitment is likely to become more difficult.
- While both employers and employees value professional development, employees face numerous barriers when trying to access learning opportunities.
- While employees with a formal recreation education or certification were quite successful in obtaining satisfactory employment, they did this with little direct support from contacts made during their education or training.

Industry Segments

The Phase One report defined four primary segments of the industry: Fitness and Active Living, Amateur Sport, Outdoor Recreation and Parks, and Community Recreation. This research explored labour market and education and training issues relevant to each of those segments. The research included detailed examination of the survey data, secondary research, and the results of in-depth interview with industry experts focused on each of these segments.

Overall, the analysis reveals generally consistent themes across these segments. These are summarized below:

- The most significant influences for the future are increasing demand and changing trends in recreation, a tightening labour market consistent with Alberta's economic growth, and the relationship with industries having related mandates.
- The greatest challenges are to do with the ability of the industry segments to obtain qualified employees to provide for the needs of the future, due to decreasing enrollment in recreation education programs and the inability of the industry to compensate its employees competitively.
- Industry employers and employees are concerned about the positioning and status of the industry, of recreation careers, and of the recreation professional.
- Industry members point to the need to elevate skills and knowledge in connection with the management and business of recreation (as noted in the Phase Two report) in order to pursue new strategic direction and innovative funding solutions.

The following sections of the report, Sections IV through VIII, address trends, the labour market, and expectations for education and training within each of the primary segments of the recreation industry.

Section IV. Fitness, Active Living, and Health Promotion

This segment of the recreation industry shows strong growth. Fitness and active living has been promoted as part of a healthier lifestyle since the middle of the 20th century. The baby boomers heard these messages when they were young. As they reach middle age and begin to prepare for their retirement they, and the generations following them, are taking this advice to heart. Therapeutic recreation and rehabilitation are key components of this drive towards healthy and active lifestyles. It is widely acknowledged that active lifestyles result in reduced health care costs. Given the high cost of health care, promoting active living is a good investment for governments.

Consequently, the profile and perceived value of recreation as a key lifestyle choice has been elevated in the minds of an ever-increasing population. Organizations with a mandate for healthy living therefore include a clear focus on promoting participation in recreation and active living. This is a worldwide trend.

The latter part of the 20th century saw continued growth in the incidence of private sector establishments and public and private sector programs focused on this broad, but clearly defined mandate. Over recent years, however, government and institutional policies with respect to health care insurance have gradually limited access to some of the services provided through this segment of the industry.

Suppliers of these services needed to re-orient their revenue strategies. Public attitudes towards fitness changed as the public and private sector participants in the industry, supported by visible role models, communicated the importance of fitness and health. Private sector opportunities arose. Public and private sector suppliers continue to strive to meet the demands of Alberta's growing population.

Survey Response

In this research, 58 survey respondents were categorized in this segment of the recreation industry. Six of the industry interviews were conducted with professionals from this segment. Topics discussed in the student focus groups also addressed this group. Conclusions from the survey research must be drawn with caution due to the small size of the sample. However, interpreted in concert with the comments from the industry interviews they provide a view of the labour market conditions in this key segment of the recreation industry.

The survey response in this segment of the recreation industry was from organizations whose primary focus is on health, fitness, rehabilitation, and therapeutic recreation (39%) or on providing activities, entertainment, events, or festivals (36%). A smaller proportion of the respondents report their organization is focused on other related priorities.

Three quarters of the respondents are focused on urban markets. Survey responses achieved represented organizations whose market areas covered all areas of Alberta.

The respondent organizations were categorized into several groups (Table 4.1):

Table 4.1 Organization type

Type of Organization	Number of Responses
Not for Profit Societies	12
Municipal Government Agencies	11
Provincial Government Agencies	10
Educational Institutions	9
Self Employed/Small Businesses	8
Health or Community Services	7
National or Multinational Corporations	1
Total	58

The organizations responding to the survey reported an average age of 28 years, younger than most of the responding organizations. Technology-related jobs and program planners and deliverers dominated employment counts. The average

number of full time employees in these organizations was reported as 22, supplemented by 33 part time or seasonal workers.

The qualitative and quantitative research shows that changes in the numbers of employees, both positively and negatively, come about most often as a result of changing levels of demand for services. The survey respondents indicated that the number of employees in this segment is expected to increase during the next five years. The rate of increase is expected to be highest in marketing, retail, and customer service. This demonstrates the importance of enhancing revenue streams. However, significant or above average growth is expected in all job categories.

Key Influences for the Future

The largest proportion of respondents with this mandate in the industry survey (more than one third of them) noted, in an open ended question, that demand changes, industry trends, and demographics would represent the greatest influence on their segment of the recreation industry during the next five to ten years. The industry experts confirmed this as the most important trend that must be accommodated, reflecting that the cost of staffing and attracting suitable qualified candidates will remain a challenge for the foreseeable future.

As the baby boomers age, they are expected to focus increasingly on fitness, active living, and related recreation pursuits. Thus increases in the availability of active living/fitness, leisure education/lifestyle coaching, and therapeutic recreation professionals and practitioners will be essential.

The survey respondents suggest that two fundamental issues will have the next greatest influence on human resources in their segment of the recreation industry during the next five to ten years. One quarter (25%) of the respondents identified each of the following, unaided, among their three highest priority influences.

The first factor is the extent of government and public focus on fitness, recreation and sport, and health. The industry experts explain that this also influences demand. As government and the public focus more on these key components of a healthy lifestyle, demand for facilities, programming, and services will increase faster than growth that directly reflects increasing population. Increasing promotion of physical activity as a component of a healthy lifestyle is as much a priority for health as it is for recreation mandates.

Second, the survey respondents and the industry experts noted the importance of positioning recreation politically and competitively. The industry experts indicated that individuals planning their career path are attracted by high profile industries. They perceive that recreation employers often compete for employees with industries with closely related mandates. Sometimes the related industries, for example health, appear more able to attract qualified employees as they appear better funded and offer broader career growth opportunities.

Third, the research indicates that in hiring, the limited capacity of the industry to provide competitive wages, coupled with a growing shortage of available human resources, exacerbate the challenge of competitive positioning. The survey results, industry interviews, and discussions with educators all confirm that the vision and reality of recreation as a career choice needs to be elevated. They point to a resolution of this challenge based on strong communication and building strategic alliances and partnerships.

The student focus groups expanded on their view of this challenge. For many, the choice of recreation as a career is predicated on a vision of recreation as a career in which professionals can make a difference, rather than on a decision to join a vibrant industry. Some students indicated that they joined recreation education programs because they appear easier to get into than other programs. The student focus groups pointed to the particular attractiveness of career options in this segment of the recreation industry for their future employment.

The World Health Organization continues to promote integrated delivery of a wide range of community services that include active living. In the new Healthy Communities organization model, the health mandate includes coordination of public services such as transportation, planning, and recreation.

Increasing requirements for certification are expected to influence the labour market in this segment as it addresses issues of risk management. Quality assurance standards and the recognition of professionals are important foundations of this thrust.

One of the industry experts interviewed in the research indicated that recreation is often seen more as an art than a science. It needs to develop better quantification and measurement approaches to demonstrate and validate its outcomes. Clients, governments, and the general public often place greater trust in things that can be quantitatively measured and expressed.

As demand increases, it will become increasingly important to take innovative and partnership-based approaches to delivering mandates and using scarce and already busy facilities. The in depth interviewees in this segment of the industry (and others) promote formal linkages, shared goals, and improved coalition between health, education, and recreation. Private and not-for-profit organizations will need to work together and in a mutually supportive environment.

Employment Trends

This segment of the recreation industry maintains a clear focus on human resource management priorities. Human resource development is a strong priority.

Several factors associated with human resources affect organizational efficiency. While these employers are able to attract enough applicants for positions, they are concerned that they are less able to recruit qualified applicants into vacancies. A leading contributor is their inability to pay competitive wages. Further, the high costs of training limit effective professional development.

Job characteristics in this industry segment are quite different from those reported in other segments. By comparison, these employees appear significantly less likely to work overtime, both paid and unpaid, but somewhat more inclined to work shifts.

Employment Characteristics

Organizations in this segment of the recreation industry appear to have responded to recent operating trends, which tend to be associated with increasing demand, by increasing their number of employees. Half of the respondents in the survey reported they had increased their complement of full time, part time, and casual positions during recent years, confirming the growth trend noted previously. They reported lower turnover than organizations in other segments and were less inclined to report difficulty in hiring. None of the respondents reported “little change” or a decreased number of jobs.

This segment of the recreation industry appears to pay slightly higher rates than average for general management and supervision, leaders and interpreters, and program planners and deliverers.

Compared with other segments of the industry, these employers also reported providing a wider range of employee benefits. Further, they were more likely than employers in other segments to offer “incentive” benefits such as pension plans, day care, educational leave, or subsidized education or training. It is interesting that they were the segment least likely to report that Alberta Health Care premiums are paid by the employer.

Human Resource Priorities

By comparison with other segments, the survey results suggest that most of these employers allocate budgets and time for training. More than half of the organizations have job descriptions that define expected skills and training requirements and almost as many specify human resource development objectives in their business plans. These employers appear less likely than others to leave employees to take training on their own time or to leave training at the discretion of the employee. This approach to human resource development is consistent with the progressive and strategic philosophies and strong growth in demand that appear to characterize this segment.

However, the limited availability of time for training constrains human resource development more in this industry segment than in others. The industry experts explain that time is always at a premium in this segment. However, it is notable that no respondent from this segment suggested that there is a lack of interest in training among staff. Additional barriers included lack of funding for training, lack of available staff coverage to enable training, and a lack of suitable courses in the area – although some are available through the Alberta Fitness Leaders Certification Association (AFLCA).

Skill and Knowledge Gaps

An open ended question in the survey invited respondents speaking as employers to identify up to three areas in which their employees require better skills or knowledge in order to benefit their employers better. The response from this segment includes some clear areas of emphasis. Responses were distributed between:

- Business skills
 - Marketing and public relations; creativity, innovation, or conceptual thinking; planning and evaluation.
- Program planning or delivery
 - Teaching, training, or coaching; program and event planning and delivery; therapeutic recreation; health, fitness, and wellness
- Dealing with customers
 - Working with diversity; influence of life stage.

The industry interviews indicate this segment of the industry is built on a business model and that employees must be prepared to execute that. Priorities range from enhanced management skills, monitoring and evaluation, and partnership alliances.

The survey respondents and the industry experts agree that the highest priorities for skill and knowledge development are associated with the business operation or management of their organization. High priority skills included research and analysis, negotiation, project management, budgeting or financial management, business or proposal writing, and customer handling.

The assessment of employers shows that skill and knowledge enhancement is required throughout the industry, including front line, business/management, and programming areas. This segment of the recreation industry includes a large number of private sector operators and has experienced significant growth during recent years as a result of increasing participation rates in health, fitness, and wellness.

This assessment, supported by the opinions of the industry experts, suggests that emphasis in these areas must be a high priority in both education and professional development.

Knowledge enhancement priorities included facility operation, therapeutic recreation, and entrepreneurship.

The need for better skills and knowledge identified by employees in this segment of the industry parallels that quoted by the employers. This consensus of opinion confirms the importance of focusing education and training strategies to meet the demands associated with this growing and progressive industry segment.

Education and Training

Two-thirds of the survey respondents reported that they hold a formal recreation qualification or certification. Two-thirds hold a post secondary degree with emphasis in recreation and one-third hold certification by a recreation industry association (e.g. AFLCA). The survey indicates that 70% of the respondents hold a post secondary or graduate degree. On average, the employees completed their last formal education more than 10 years ago.

The survey provided an opportunity for the employers to measure their satisfaction with the educational or training preparation their new employees received. Their responses showed that employees graduating from certification programs provided by recreation industry organizations, graduate degree programs, and post secondary degree programs were fairly prepared to meet their needs. Community college programs with an emphasis in recreation and private institution training programs rated lower, but still better than “adequate”.

Based on their work experience, the employees expressed their satisfaction that their recreation education had prepared them well for their work. The employees indicated that their education or training positioned them well to find a suitable job. However, they did not agree that contacts from their education or prior training were of significant importance in

helping them secure a job. The research also suggests that employers do not always seek candidates with formal recreation education or training for recreation jobs.

Learning Strategies

The survey explored preferred learning strategies for professional development.

Responding as recreation industry employees, only a small proportion of the survey respondents selected as their preference a learning strategy for professional development based on courses at universities or community colleges. The majority of respondents prefer less formal approaches. However, this is consistent with the fact that the largest proportion of the survey respondents were established in their careers and their opportunity to take extended leave for education is limited.

The response prioritized a learning strategy based on attending conferences and seminars (selected by 85% of the respondents). Self-directed learning and learning on the job (each selected by 78% of the respondents) represented the second choice strategy. The industry experts indicated that their limited availability of time significantly limits their opportunity for professional development and that may have influenced their selection.

Asked about their preferences for delivery methods for recreation education and training, these survey respondents indicated they preferred most, shorter seminars away from the workplace, followed by formal in house training using external trainers and short seminars and workshops at the workplace. Other suitable delivery methods included mentorship, reading, and formal courses at educational institutions. They liked least correspondence or other distance learning, internet, and “brown bag lunch specials”.

For their learning environment, the respondents indicated experiential learning, close interaction with an instructor, individual learning with guidance, and self-paced modular programming. The least favoured strategies were campus/classroom methods.

A comment from the industry interview program indicates that the delivery system must recognize the diversity of the field and meet the needs of the variety of recreation providers. Professional development and education must therefore be multi faceted. It is essential to provide the framework and streaming that allow people to enter where they need to and to channel their efforts progressively. Further, as the suppliers in this segment of the industry are distributed throughout rural and urban environments, the delivery system much offer innovative approaches for those in more remote locations.

Recreation Careers

Challenged by increasing demand, the issue of recruitment and retention is an important priority in this segment of the recreation industry. The high profile and identity of these employers positions them well to attract and retain employees. Industry discussion and the focus groups indicate that employees and students perceive this segment of the recreation industry offers attractive career opportunities. However, the relationship of recreation industry jobs in this segment of the industry to other mandates (e.g., health) constitutes both a benefit and a challenge. Although recreation professionals fill many of the jobs in these groups, health, fitness, wellness, kinesiology, rehabilitation and therapeutic recreation have all assumed unique identities.

The perceived benefit is the high profile that results from interaction with the health and other sectors and the more commercial orientation of opportunities in the industry. As new areas of specialty evolve and assume their own identity, some employees are perceived to lose sight of their job as a “recreation” job and see themselves instead as professionals in a career that is “related” to recreation – they often become inclined to lean more toward the identity of the related mandate (e.g., health) as they describe their job.

Nearly half of the survey respondents in this segment joined the recreation industry directly from their education. Most of the remainder joined from public service jobs or from retail, wholesale, or distribution.

The survey included a multiple choice question focused on the reasons employees chose to seek employment in recreation. This area of research suggests that employees in this segment of the industry are narrowly focused on a recreation career. They saw lots of recreation job opportunities and appear to be pursuing a recreation career rather than looking for a job, and to be making career choices.

Some looked at this as a profitable business opportunity. However, they were less inclined than respondents in other segments to respond that they wanted to establish their own business and less likely to see this as a profitable business. Although they were less likely than others to be trying to leave a previous job, they were more selective about the community in which they wanted to live.

Employee Recruitment

Employers' recruitment strategies are generally consistent with the job seeking strategies of employees. As they are somewhat broader, the recruitment strategies do not appear to hinder finding job candidates.

The survey results suggest that these employers take advantage of technology (e.g., website postings, more than 80%), media advertising (two thirds post jobs in newspapers), and referrals (e.g., posting jobs at colleges and universities, nearly 60%; encourage employees to recruit friends, more than 40%; job and career fairs, 30%) as recruitment strategies. As with other segments of the industry, these employers seek internal candidates to fill vacancies. They appear somewhat less likely than other employers to post jobs in newspapers.

Employees showed that they are more inclined to have heard about their job through a friend or relative (more than half of the respondents), a newspaper posting (more than one third), a website search (one third), or a job posting at a college or university (more than 30%). Nearly half of the respondents were internal candidates.

The important role of the educational institutions in job placement is evident from this analysis. Not all employees are seeking jobs directly from college or university, but the linkage between the recreation industry employers and the education institutions is clearly successful in career direction for graduates.

Retention Strategies

The employers assessed attrition rates as low-to-average. Attrition among employees involved in program planning and delivery was notably lower by comparison with employees involved in management, business-related, or support positions.

A multiple choice question in the survey compared the retention strategies of the primary recreation industry segments. In general, this segment compares closely with other segments, although there appears to be a higher propensity in this segment to provide additional employee benefits. Overall, retention strategies are focused on employee benefits, training and education opportunities, promotion and advancement opportunities, rewarding outstanding work accomplishments, and pay incentives.

The student focus groups and the industry interviews suggest that people seek recreation careers because they believe they can make a difference. They choose recreation knowing that higher salaries are paid in other industries.

Addressing the topic of effective employee retention strategies, the employees note the importance of training and education opportunities as their highest priority. This is consistent with priorities reported by the employees in other segments. They also note the importance of compensation plans, including salary, promotion, benefits, and rewards for higher performance and for education and training. Overall, nearly half of the employees in this segment of the industry indicated in the survey that they are very motivated to stay with their present employer.

It is particularly interesting that even in this strong segment of the recreation industry, the survey response indicates that these employees are less likely than those in other segments to have received a promotion to a position to higher authority, to have received an increase in wage or salary, or to have been assigned increased responsibility. This suggests that jobs in this segment are narrowly focused within the recreation professions. That is consistent with the clear identity of organizations in this segment. These employees may be more likely to have received opportunities to learn new skills or knowledge and recognition for outstanding performance.

The Employees

The responses of employees to certain questions in the survey indicates an experienced workforce with some mobility. The average number of years of employment in the respondents' present position was 5 years, while they reported they

had been with their present employer for nearly 8 years. They had worked an average of 12 years in the recreation industry during their career.

The respondents were generally equally distributed between general management and program-related positions. Two thirds were in full time employment and most of the remainder in part time positions because they wanted to be. Three quarters of them were on the permanent staff of their organization.

In this segment, most of the respondents to the survey were female, including representation from all age groups from 20 to 59 years. Most were aged 35 to 55 years. Their total annual personal income from their primary recreation industry job ranged from less than \$20 000 to more than \$100,000, with most in the range of \$20,000 to \$60,000. Four out of five hold a membership in a professional organization or a formal recreation industry association.

Job Satisfaction

Most of the employees note that recreation is their chosen career path. Their attitude towards their future career in recreation is that they are most satisfied with the level of challenge, the opportunity to learn new skills, the type of job duties, and their working conditions. They are least satisfied with the number and quality of recreation jobs and the income potential in the recreation industry.

Overall, employees in this segment appear to be marginally more satisfied with their job than most other recreation employees. Only the Education, Professional Services, and Program Administration segment employees rated their overall satisfaction higher.

These employees were most satisfied with their level of challenge, social working environment (their fellow workers), the opportunity to learn new skills, the types of job duties and their advanced training and education opportunities. They were least satisfied with the quality and number of recreation jobs available, the income potential in the recreation industry, the social status of recreation employment, the level of benefits provided in jobs, and the rewards and recognition given.

By comparison with other segments of the recreation industry, overall satisfaction is limited by comparatively lower satisfaction with the quality of recreation jobs available, income potential, the level of benefits, the number of jobs available, and the physical surroundings in their working environment. Higher satisfaction than that reported in other segments was associated with the social working environment, advanced training and education opportunities, the level of challenge, and general working conditions.

Conclusion

This segment of the industry has higher profile positioning, faster growth, stronger identity, and displays a higher propensity to be in the private sector than participants in other segments of the recreation industry.

Motivating stronger positioning for the industry and for recreation careers will contribute to increasing the interest of employees in recreation as a career. However, there is consensus among the populations included in this research that the industry must find a way to pay competitive salaries in order to position itself competitively for the career seekers in Alberta's increasingly competitive job market.

Strongly motivated employees are essential to the enthusiasm that drives growth in a progressive industry. Many employment conditions contribute to the motivation of the employees in this group. However, as demand increases opportunities facing potential employees will become even more competitive. Even in this high profile segment of the recreation industry, attracting and retaining employees and building leaders for the future will require attention to some fundamental components of human resources planning, including salary levels, benefits, career advancement, and the social status of recreation careers.

Section V. Amateur Sport

The labour market conditions in the Amateur Sport segment of the recreation industry are quite unique. At the delivery level, this segment is characterized by a small number of employees and a huge number of volunteers.

Most amateur sport organizations are not for profit societies. Their Boards of Directors are volunteers, as are most of the people delivering the programming (the coaches, organizers, judges, and umpires). In many amateur sport organizations the only employee is a full time or part time executive director, whose time is stretched between responsibility as Board secretary, coordinator, communicator, administrator, bookkeeper, librarian, event organizer, and receptionist. Sometimes there is a small supporting staff.

A total of 47 responses in the survey were received from this industry segment. Three industry interviews were conducted in the amateur sport environment.

The status of amateur sports organizations is predicated on several factors, ranging from the popularity of the sport, the profile of related professional sport, the performance of Canadian athletes in high level performance, and the motivation of the many volunteers serving the industry. Amateur sport touches most families as children and adults participate in team and individual sports throughout the province.

In that context, the industry indicates that funding at the grass-roots level is needed to build a strong resource of athletes from which to draw out elite athletes. However, that funding is not forthcoming.

Funding of amateur sport is somewhat volatile, with changes in government commitment affecting many aspects of the industry. Local costs are funded by membership and participation fees.

The industry interview program reveals that the execution of amateur sports strategies are directly limited by funding challenges. Amateur sports organizations have pursued funding relationships with the private sector, but as taxation rules do not permit the amateur sports organizations to be classified as "charities", the relationships must be built on corporate marketing budgets.

Amateur sports stimulate significant economic benefit in Alberta in connection with regular competition and tournaments and other major events. Participants travel extensively for these competitions.

Survey Response

In all, 47 survey responses were received for this segment. Four industry interviews were conducted. Table 5.1 shows the type of organizations reporting.

Table 5.1 – Organization Type

Type of Organization	Number of Responses
Not-for-profit society	27
Provincial government agency	9
Federal government agency	8
Private sector, educational institution, other	3

The organizations were an average of 31 years old, and the primary focus of three-quarters of them is on providing sport activities. Most of the remainder reported a primary focus on professional, education, or financial mandates.

Most of the organizations were focused on urban markets. That is where most of the formal amateur sport organizations and their primary business relationships are located. The limited response may reflect one of the challenges of this segment: in the field, volunteers operate most of these organizations and their commitment of time is clearly focused on delivering the sport opportunity.

However, the market area served by these organizations is broadly distributed across Alberta, in both rural and urban areas, and two-thirds are focused on multiple market areas.

Key influences for the Future

The most important factor that will influence the future five to ten years in this segment of the recreation industry is its ability to secure funding from public or private sources or user fees to continue to deliver on this mandate, specially in light of increasing demand associated with Alberta's high population growth rate. Sports organizations and the survey respondents explain that overall demand for sport programming generally follows population growth, but funding has not kept pace.

Funding is a major issue for organizations in this segment. A shift to project-oriented funding has caused an increase in paperwork and competition among sports organizations, consuming more of the time of already busy employees. Increasing accountability has also increased the administrative workload. However, core or administrative funding appears to have diminished, while operating costs have increased. As a result, plans to accommodate increasing demand may have a weak financial foundation.

Many factors influence demand as individual sports activities become more or less popular. It is a particular challenge for the industry that changes in popularity often occur with huge magnitude - and that simply increases the pressure on the volunteer base. The survey respondents, echoed by the industry experts, are concerned about the ability of this segment to continually respond to increasing demand.

Sports organizations are integrated through national mandates. Often the national mandate affects the related Alberta sports organization. Certification programs for coaches, judges, and trainers, often governed outside Alberta, have become more stringent as risks and expected quality standards both increase.

Willing volunteers often pay for their own training and certification, adding time and cost to their contributions. In an in-depth interview in another segment, an interviewee commented that no one would expect a music teacher to provide lessons at no charge, but we expect hockey coaches to pay to take coaching training and develop the skills that are required in order to permit them to donate their time to the sport.

As sports facilities age, they become increasingly expensive to operate. Further, specific operating costs, such as insurance and utilities, have increased dramatically. These costs also affect the industry. While increases in user fees can offset some of these costs, reductions in administrative operations often take place to accommodate financial constraint.

Employment in most areas of this segment is administrative or management in nature, but includes programmers, coordinators, and technicians. Volunteers provide for most other human resource requirements. Often the volunteers at the community level first get involved as the parents of children participating in a particular sport.

The survey respondents and the industry experts are concerned about the how recreation is positioned politically and competitively. The industry experts suggest that sport is seen by some to be an activity organized by interested volunteers. However, awareness of the importance of amateur sport participation in building self-esteem, teamwork, commitment, motivation, and respect - all exceedingly valuable life skills - is often lost. Without the benefits of amateur sport, it is likely these characteristics would need to be addressed in other, often significantly expensive ways.

Employment Trends

The organizations represented in this research reported an average of six full-time and nine part-time or seasonal employees.

Reflecting steady increases in demand over recent years, more than half of the employers noted increases in their numbers of full-time employees. They also reported increases in part-time or casual positions and increased use of unpaid overtime as organizations wrestled with expanding workloads and budget challenges.

The employers note that in response to continuing expansion of demand, there will be growth in several areas over the next five years. The highest rates of growth are expected to be associated with marketing, sales, or communication,

followed by leaders and interpreters. This is consistent with the skill development priorities noted by the employers, which are focused on business or management and leadership.

Other areas of growth are expected to include technology-related employees (including skilled trades and equipment operators) and other business or management areas.

These organizations comment on the huge contribution of volunteered time and skill from which they benefit. Volunteers support most sport organizations throughout the province.

Attrition rates are most significantly a challenge with respect to leaders or interpreters and program-related staff. This is the front-line delivery area of this segment of the industry, and there is a constant effort to replace volunteers and employees in it. This simply exacerbates the challenge presented by increasing demand, which has its greatest impact in this area.

Attrition is not described as a significant challenge in the area of administration and general management, or in technology or equipment operating areas. These are also noted as growth areas.

Employment Characteristics

Due to the combined effects of high demand, participation rates in activities, and the external priorities of activity participants, regular weekend and evening work are inevitable in this segment. Indeed, job characteristics are reported by the employers to include regular work on weekends and evenings and regular unpaid overtime. Twice as many respondents said they regularly work unpaid overtime compared with those who responded that they work paid overtime.

Rates of pay in this segment appear to be generally consistent with pay rates in other segments of the industry. However, employees in marketing and technology areas may be a little higher while financial management and program-related areas may be paid on lower scales. This may reflect the large number of volunteers in this segment whose contribution of time is not compensated.

All of the respondent organizations report offering employees dental plans and other life or health benefits. Most paid Alberta Health Care premiums and offered pension plans. Three-quarters of the organizations subsidize education and training for their employees.

Human Resource Priorities

Two-thirds of the employers noted that job descriptions in the industry define expected skills and training requirements. More than half responded that they have a budget for training and/or that they make time available for employee training. These organizations do not reward employees for accomplishing approved training and most do not have formal training plans or training programs.

These organizations are concerned at several factors that limit the effectiveness of their organization. These include notably their inability to pay competitive wages and competitive benefits and, consequently in their opinion, their inability to attract qualified candidates to fill vacancies. However, they do not report concern with attrition rates, indicating the commitment of individuals in these jobs. Employees note that they like the relaxed environment associated with this segment of the industry.

Skill and Knowledge Gaps

As with other segments of the recreation industry, amateur sports organizations appear to be concerned most about skill and knowledge gaps affecting the management and business of their segment. Employers point clearly to the need for better problem solving, leadership, computer, budgeting and financial, human behaviour, and communication skills.

Other business or management skills are also important areas for improvement. The employers noted that research and analysis should be a significant priority for skill enhancement. This was followed by negotiation and recreation activity leadership skills.

Priorities for new knowledge were identified as therapeutic recreation, entrepreneurship, and a variety of priorities relevant to the delivering recreation programming.

The employees' views of their needs for enhanced skills and knowledge mirrored those of the employers, focusing clearly on similar business and management-related components of their mandate.

Education and Training

Assessing how well education and training programs have prepared employees for their work the employers in this segment of the recreation industry note their highest satisfaction is with community college programs with an emphasis on recreation, followed by graduate programs and industry-provided training. These programs have provided good focus and accessible programming that meets the needs of this segment. They were least satisfied with the training provided by private institutions.

In the not-for-profit sector of this segment, a notable proportion of the employees are association managers, rather than strictly recreation professionals.

Based on their working experience, the employees noted they were satisfied that their recreation education or training prepared them "better than adequately" to meet the responsibilities of their job. However, compensation may not compensate qualified employees adequately, leading to a question about how employers value the qualification.

Concern was expressed in the industry interviews that professionals working in this segment may resist further certification as their employers cannot fund the training or compensate the employees for achieving certification.

Learning Strategies

Employees in this segment of the industry lean mostly towards learning on-the-job and self-directed learning as their preferred strategies for professional development. Participation in conferences and seminars is judged a suitable learning strategy as they provide networking opportunities that also benefit the organization in addition to the learning. The least favoured strategy was classroom-style programming.

Industry interviews indicate the constraint of significant time stress as administrators juggle a wide range of priorities. They explained that they have no time to leave the office for training and there is often no-one to cover for them while they are away. They also note that limited funds are usually not available for training employees. This likely influenced the response to this question.

Learning strategies associated with certification and technical issues such as coaching and judging are dictated by the certifying agencies.

These employees reported that the most suitable delivery systems were short seminars away from the workplace, internet-based systems, short seminars or workshops in their workplace, and mentorship by a more experienced professional. They were less committed to programs provided at educational institutions. This likely reflects the fact that they are advanced in their careers, experience significant time stress, and completed their formal education several years previously.

Also to do with their learning environment, these employees prefer experiential learning, modular, self-paced programming, internet resources, and regular communication with an instructor. They were less in favour of campus or classroom methods.

Consistent with the view of the employees with respect to learning strategies, it was suggested in an industry interview that short, low budget seminars at various locations might be provided by ARPA as a part of a strategy to build the skills and knowledge required in this segment. Such programming would be designed to bring a practical focus to professional development.

Barriers

The employers noted several barriers to education and training. The most significant of these is simply the lack of funding for training and the lack of time or position coverage to provide for training. Some of the employers also reported that there is a lack of suitable courses in their areas.

The employees indicated there is not enough time for them to pursue professional development, notably due to family priorities. Only a small number of the employees reported as a barrier the lack of employer incentives to support professional development.

Recreation Careers

The employers in this segment indicate that employees enter the recreation industry directly from high school and they tend to leave the industry in their early or mid-career. Half of the respondents, who tend to be in management positions, joined the industry directly after studying in college or university. The retail, wholesale and distribution industry is also shown as a source of employees in the amateur sport segment of the recreation industry.

Several respondents indicated that they saw recreation as a profitable career, they wanted to establish their own businesses, or they thought there were lots of recreation jobs. However, the motivation of these employees to join the recreation industry does not appear to be through a focused career orientation. A larger proportion of the employees showed, through a multiple-choice question in the survey, that they sought employment in recreation because they were let go in their previous job, they needed money quickly, or were unemployed and needed a job.

Employee Recruitment

Recruitment strategies described by the employers focused on newspaper and website postings and a variety of referral systems including employment assistance programs. Job fairs and third party recruiters were not high priorities.

The employees determined that the knowledge and skills they gained through their education and training were consistent with their employers' needs and positioned them well to qualify as a candidate. However, their employers were not significantly inclined to seek employees with a formal recreation qualification. The employees noted that contacts from education or training were of limited value in helping them to find a suitable job.

The employees also focus on newspapers and websites, as well as referrals from friends and relatives. More than one third of the respondents were internal candidates.

Retention Strategies

The employers use a wide range of strategies to retain employees. Higher priority strategies include employee benefits, education and training opportunities, and rewarding outstanding work. Pay-related strategies were a lower priority, likely due to the funding challenges faced by this segment.

Although retention strategies are not focused on pay incentives, the survey shows that three-quarters (75%) of the survey respondents have received an increase in salary during their current employment. Other benefits received include the opportunity to learn new skills or knowledge and increased responsibility. Several employees reported that they had received no changes of this kind in their current employment.

More than one-third of the employees included in the survey response note that they are very motivated to stay with their current employer. The views of employee retention strategies held by the employees are generally consistent with those of the employers.

The employees include providing training and education opportunities, rewards for outstanding work, and additional employee benefits. A smaller proportion added a preference to be paid based on their performance. However, they do not expect to be paid above industry standards.

The Employees

The employees responding to the survey reported an average of 14 years recreation employment experience and just more than four years with their present employer. They had been in their present job for more than four years. Their average workweek was reported as 38 hours.

The survey respondents were mostly in general or financial management or administrative positions. Program-related staff were also included in the survey response. Most of the employees were in full time positions and on the permanent staff of their organization.

More than half of the respondents held a post secondary or graduate degree and most of those degrees include an emphasis in recreation. On average, they completed their last formal education or training in 1992.

Slightly more than half hold a formal recreation qualification or certification. One third of the employees are members of a professional organization or formal recreation industry association.

Slightly less than two thirds of the respondents were female. The respondents were distributed throughout all age ranges up to 54 years with most in the range of 35 to 49 years. Half of the respondents reported their personal income from their recreation industry job in the range of \$40,000 to \$59,000. Most of the remaining respondents reported lower incomes.

Job Satisfaction

Overall, the survey respondents indicated that they were more positive than negative with respect to career satisfaction. Their satisfaction is higher with respect to the level of challenge, the type of job duties, the amount of work provided, the hours of work, their work environment, and the opportunity to learn new skills. They are less than satisfied with the income potential and benefits the rewards and recognition, and the advanced training and education opportunities, and the social status of recreation industry employment.

Although two-thirds of the employees noted that recreation is their career path, these factors influence their attitude towards their future participation in the recreation industry. One quarter of them had not formulated a decision on their future employment in the industry. They are satisfied with the level of challenge, types of jobs, the opportunity to learn new skills, and their working conditions, but are less than satisfied with the income potential in the industry and the number of jobs.

These factors explains why employees appear to leave this segment of the industry in their early or mid-careers.

Conclusion

This segment of the recreation industry faces significant challenge with respect to its ability to build a qualified workforce to meet the demands of a volatile but growing marketplace. This appears to be most significantly associated with funding strategies and the limited amount of funding available.

Despite the success of aggressive strategies and national alliances, funding may be constrained by the existing view of the role and value of professionals in this segment of the industry.

The high level of dedication of the employees in this segment maintains the core human resource complement, but growth challenges the continued programming and delivery of amateur sport. The shortfall is picked up by volunteers, whose commitment of time is becoming increasingly constrained.

Professional development programming and education planning can contribute to the growth of the industry by including a practical focus and accommodating the limited ability of this segment to pay for new training. This is especially important given the trend towards more formal professionalization in sport organizations in both Alberta and Canada. The need for professional development is further accentuated by the increasing attention being given to skill development at all levels of sport participation as a means of acquiring lifelong skills.

Section VI. Outdoor Recreation and Parks

The Outdoor Recreation and Parks segment of the recreation industry includes a wide variety of outdoor activities, campgrounds, and parks. Most of the provincial campgrounds are privately owned or are operated under contract to the Government of Alberta. As well, there are many municipal parks, campgrounds, and urban trails that fall within this segment.

The Government of Alberta has frequently shifted responsibility for provincial parks from one department to another in successive restructuring programs. Parks responsibility is presently assigned to Alberta Community Development.

Survey Response

The following table summarizes the types of organizations represented by the 49 survey responses from this segment. Four industry interviews were conducted in this segment.

Table 6.1 – Type of Organization

Type of Organization	Number of Responses
Municipal government	29
Not for Profit Society	13
Provincial government agency	4
Private sector	3

On average, the organizations included in the response reported a 55-year history. They are clearly long-established organizations.

Approximately two-thirds of the organizations serve urban markets. They are broadly distributed across Alberta, including the major centers and more rural locations.

The primary focus of approximately half of these organizations is on facilities, parks, and the environment, including nature appreciation and environmental education. Other organizations are focused on activities, entertainment, events, and festivals, and community development and administration.

Key Influences for the Future

Assessing the major influences that will affect this segment of the recreation industry during the next five-to-ten years, the survey respondents and industry experts note their most significant concerns relate to their ability to meet increasing demand. They talk of the challenges of changes in demand resulting from increasing population, demographic change, industry trends, and changing perceptions of outdoor recreation.

Their concern is with respect to how they can produce the funding, from government budgets or operating revenues, to meet the increasing and changing demand. Increased operating costs, notably insurance, utilities, and risk management, are growing disproportionately. Maintenance, repair, and replacement costs are increasing as infrastructure ages and must continually be expanded and upgraded to meet changes in demand.

The industry competes with major employers in other sectors of the economy for its employees. It is wrestling with ways to satisfy future staffing and salary needs as demand for employees and for services and facilities increases. The balance between direct employment and contracted employment is a current challenge.

Increasing operating and infrastructure costs and increasing demand directly affect the ability of this segment to pay competitive wages. In turn, that causes difficulties in hiring and higher attrition rates.

The competitive positioning of recreation is also noted as a significantly challenging issue. Without strong positioning, this segment finds itself challenged for funds and employees by other industry mandates.

Demand forecasts based on population and industry trends indicate that this segment of the industry will be challenged increasingly during the forthcoming five to ten years and more. An increasing government focus on resource management in this segment is expected to raise environmental awareness in Alberta and that will increase the use of parks.

The condition of infrastructure in this segment of the industry is seen to be directly impacting delivery. Discussion with industry experts in the industry interviews suggests that significant investment in infrastructure must return “soon” to offset deterioration of the condition of facilities during many years of very limited investment. That will be essential to accommodate increasing demand.

Tens of thousands of volunteers work in this segment of the recreation industry. Strategies for volunteer development and integration are a high priority.

There is increasing popular interest in natural areas. This leads to increasing demand for information services, infrastructure, and interpretive programming. Consequently, there is an acknowledged shift towards customer service, and people or skill requirements from some of the technical skills.

The industry interviews reveal that in light increasing demand for programming and related services, this segment is actively preparing to meet projected labour shortages and increasing competition for employees through the use of some very innovative human resources strategies.

Employers note competition for employees among players within this segment. This is expected to increase during the next five to ten years as a significant number of employees will retire during that period, increasing the number of vacancies at a time when demand is both growing and changing in its nature.

There is a new generation of employers. There are different career priorities among younger employees compared the older employees they will eventually replace.

Employment Trends

Employment has expanded in this segment of the industry. In response to previous economic challenges, these organizations have increased the number of part time, casual, and full time positions and increased the use of job sharing and contracted positions. The organizations indicate increasing difficulty attracting new staff.

Attrition was shown to be generally low. It appears most significant in program related jobs, including programmers and leaders, and trades, operators, and skilled workers. Many of these positions are hourly paid and are part of a fairly mobile workforce. It was of the least concern in general management positions.

Challenges reported that face the employers in this segment include their inability to pay competitive wages and benefits and high training costs, both of which lead to difficulties in recruitment and are exacerbated by the attrition rates among the program-related employees and technical operators.

Pay scales and employee benefits in this segment are generally consistent with those in other segments of the recreation industry.

Most of the employers offer a pension plan and dental plan, pay Alberta Health Care on behalf of the employee, and offer other health or life benefits. More than half of the employees note that they regularly work unpaid overtime and more than one third say they regularly work evenings and weekends.

The industry interviews revealed the difficulty of replacing employees as they retire. New strategies are being developed to accommodate this challenge.

Human Resource Priorities

Most of the organizations responding do not reflect human resources development objectives in their business plans, and most do not have a formal training plan for human resource development. They report, though, that they make work time available for employee training, have budgets for training, and their organization’s job descriptions define expected skills and training requirements. However, nearly half of the organizations reported that they leave further training at the discretion of the employee.

The industry interviews revealed the importance of long-term human resources planning and mentoring to prepare new employees for eventual strategic leadership roles in the industry. Further, the interviews revealed the high value of training and professional development as an investment in the future of the industry.

Skill and Knowledge Gaps

In light of the changing nature of this industry segment, the industry interviews stressed the importance of preparing employees to be effective problem solvers and strategic thinkers. Employees must be adaptive and must be able to accommodate change.

Employers indicate that to meet their requirements, stronger skills and knowledge are required in several areas of the management and business components of parks and outdoor recreation. Key areas for development include project and contract management, skills related to teamwork, risk management, customer service, and communication. Better knowledge is required in environmental stewardship and park and facility operations, two of the most crucial areas of focus for employees in this segment.

Assessing the importance of enhancing skill sets in their organization, the employers note that their highest priorities for skill development are research and analysis, program and event planning, project management, and recreation activity leadership. Thus these requirements focus on the business of recreation as well as on the planning and delivery of recreation programming.

Perhaps paradoxically, knowledge requirements are focused most significantly on therapeutic recreation, health, fitness and wellness, and on legal issues, which appear predominantly to do with risk management. Other key areas for knowledge development include mostly knowledge about the recreation industry, including the foundations of recreation, working with diversity, and several other factors. It is notable that employers in this segment of the industry, which is closely involved with operating facilities and parks, were comfortable with the knowledge of their employees in these areas.

Education and Training

Overall, the employees reported that they were satisfied that their recreation education met the needs of their employer. Industry experts interviewed noted that recreation employees are well prepared with a rounded education that will position them well for mobility. They can be effective in jobs with a wide range of responsibilities inside and outside the recreation industry.

Learning Strategies

The employees consider the most suitable learning strategies are attending conferences and seminars, learning on the job, and self-directed learning. They were less inclined towards programs and universities or colleges. As with other segments of the industry, the respondents in the survey have mostly completed their education some years previously and may personally be disinclined to consider returning to university or college education programs.

The format for professional development preferred by employees in this segment of the industry included short seminars or workshops, preferably away from the workplace, formal in-house training using external trainers, and a variety of individually directed study. However, they also are in favour of mentorship by a more experienced professional.

Preferred delivery methods for learning included experiential learning, interaction with an instructor, including regular communication and direct guidance, and modular, self-directed learning. Modular programming is seen to be progressive and time-efficient.

Their professional development strategy includes attending conferences and seminars, self-directed learning, and learning on the job. The research showed the value of networking at conferences and seminars. Other opportunities for networking include lunches, dinners, and other get-togethers that prove valuable in other professions.

The industry interviews also point to the fact that the employees to be trained come from a variety of blue collar and white collar backgrounds. Therefore, learning strategies will vary and should be clearly focused on the needs of the employees.

The timing of professional development and other training is also a key factor, as there is a significant seasonal influence in this segment.

Barriers

The employers note that the most significant barriers to human resource development are lack of funding for training, lack of staff availability for coverage of employees for training, and lack of time for training. They also note the lack of suitable course in the area. However, these organizations do not report a lack of interest in training among their staff. The employees note that they do not have enough time for training, often due to family priorities.

Recreation Careers

Most of the employees in this segment joined the recreation industry directly after studying in college, or university, or from trade-related employment or retail, wholesale, and distribution.

The employers noted that employees typically join this segment of the industry after completing high school. They also report that most employees stay in the industry until late in their career or until they retire.

People seek employment in this segment because they are passionate about outdoors and the environment. There is a very large volume of seasonal work opportunities.

Employee Recruitment

The organizations use a combination of strategies for employee recruitment, including newspaper postings, seeking internal candidates, and job postings on the organization's website.

The employees tend to focus most on newspaper postings, internal promotion opportunities, and referrals from friends or relatives. In the expected increasingly competitive labour market environment of the future, more rural and regional employers will need to aggressively promote the benefits of jobs in their area.

The employees noted that they benefited in their search for employment from contacts from their education and that their education positioned them well for in job search. Some of their employers sought candidates with formal recreation education.

Universities, employers, ARPA, and other organizations would contribute well to the recruitment process with "job boards" for graduates or members on their websites.

Retention Strategies

The employees favour occasional rewards for outstanding work, training and education opportunities, internal promotion opportunities, and enhanced benefits packages as the most suitable retention strategies. They do not appear to be motivated by pay for performance, profit sharing, or payment of wages higher than the industry standards.

The employers base their retention strategies on providing training and education opportunities, internal promotion opportunities, and employee benefits.

Consistently with their assessment of suitable retention strategies, most of the employees have received an increase in responsibility and an increase in wage or salary during their current employment. They are long-term employees. Most have also had the opportunity to learn new skills or knowledge.

The Employees

The employees reported they have an average of 14 years experience with their current employer, but they have been in their present position for just over half of that time. They report an average of about 17 years experience in the recreation industry, somewhat longer than the average for the industry. Their normal workweek is conventional.

The largest proportion of the employees (about one-third) hold a post-secondary degree. Respondents included individuals with graduate degrees, high school diplomas, and a variety of other certifications and educational accomplishments. On average, they completed their last formal education in 1984, significantly previously to the employees in other segments, where the average was shown to be 1991.

More than one-quarter of the respondents reported holding a formal recreation industry qualification or certification. The source of their recreation education included university, college, and industry. Some 60% of the respondents in the survey are members of a professional organization or formal recreation industry association.

The respondents were 60% male, ranged in aged from 25 to 65 years, although most were in the age range 45 to 60 years. The response to a question addressing total personal income from their primary recreation job was broadly distributed.

Two-thirds of these employees are in general management positions and most of the remainder are in administrative or clerical jobs. They are mostly full time employees and on the permanent staff of their organizations.

The employees reported that they chose a recreation industry career to improve their economic circumstances or work environment. Less than half of the survey respondents in this segment reported that recreation was their chosen career path. More than a third of the respondents reported that they have not formulated a decision about their future employment in the recreation industry. This segment was unique in that respect in the survey. Respondents in most other segments were more inclined to be career recreation professionals.

The attitude of the employees in this segment with respect to their future career in recreation indicated satisfaction with the level of challenge and the opportunity to learn new skills. They were also satisfied with their working conditions. However, they were less than satisfied with the number of jobs available.

Recreation professionals employed in retail stores in this segment observe an increasing polarization between shops that are focused on equipping their customers professionally for outdoor and active lifestyles and those focused simply on retail. The more recreation-dedicated shops are increasingly able to hire qualified employees or recreation students who are very dedicated to consultative selling principles.

Job Satisfaction

The employees reported overall satisfaction with their career in this segment of the industry. They acknowledge satisfaction with the level of challenge, type of job, their working environment, and the opportunities for advanced training and education. They stress their dissatisfaction with the number of jobs available.

Conclusion

Alberta's parks and outdoor recreation opportunities are intrinsic to the lifestyles of both urban and rural Albertans. As the population grows and wealth increases as a consequence of strong economic growth, demand in this segment of recreation will increase. That will cause the number and complexity of jobs in this segment to increase.

This is a very exciting time in this segment of the recreation industry due to the nature of the changes taking place and expected for the future. The industry provides excellent opportunity for progressive and strategic thinkers.

The challenges of management, the business of this segment, and programming recreation will become increasingly difficult. Skill deficits noted in these areas must be addressed if the industry is to deal with the demands of the future.

Future planning should include strategies to attract more recreation professionals to consider this segment, with the anticipation that they can build a strong career with appropriate compensation and challenge. New partnerships with employers might result in sponsorship of students from a wide range of backgrounds, including rural and First Nation students.

Employees will become increasingly versatile if skill and knowledge deficits are fulfilled. They will need to be increasingly challenged to retain their interest.

The opportunity exists for the not-for-profit participants in this segment, and in other segments of recreation, to form alliances or work together to build benefits packages, employment strategies, training, and planning processes.

Section VII. Community Recreation

Recreation is a crucial component of community development for both urban and rural residents of Alberta. The availability of recreation facilities and programming is a key selection criterion in choosing where to live. Businesses also consider this a key factor as they select business locations.

This segment of the industry includes community recreation, recreation as a component of community development, and distinct areas of focus such as aquatics and facility management. Each of these areas is the subject of significant growth.

Community recreation is often very broadly based and less distinctly definable. In addition to a recreation mandate, managers are often responsible for a variety of programs, ranging from providing municipal infrastructure to municipal administration or social services. As their career progresses, municipal employees may move between municipal jobs, some of which include recreation and some do not. However, the survey data show that recreation industry professionals completed a significant proportion of the responses.

Broad mandates in community recreation and the recreation priorities of community development provide unique challenges. Municipalities provide both facilities and programming. Human resources are often allocated to combined priorities.

Often as a result of limited resources, cost reduction or streamlining, recreation has been merged with facility operation, social programming, health programming, and other areas of business. Financial priorities have direct taxation impacts for local residents. Further, much programming appears to have been shifted to volunteer activities or not-for-profit organizations.

In that context, the industry interviews suggest a closer linkage with other industry mandates. For example, social services programming suffers many similar influences to those facing recreation with respect to funding, support, and identity. Social services and recreation agencies often compete for the same resources. Social service workers in many rural and urban areas of Alberta are charged with providing recreation programming and often have little or no background or education in the industry. Thus professional development is needed for these employees, and recreation knowledge should be a priority in their education.

Aquatics has been a leading recreation activity for many years, as reported in consecutive Alberta Recreation Surveys. Population growth alone leads to strong increases in demand. Recent trends in aquatic recreation and fitness have resulted in even greater growth, to the extent that it is often difficult for swimmers to access pools.

The industry interviews reveal that the aquatics community maintains a strategic focus on its human resources opportunities and challenges and develops approaches and products to address them. This portion of the industry segment has in place a strong training and certification program, including strategic focusing and delivery tools.

For example, the Alberta and NWT Lifesaving Society has taken the lead in pursuing an Alberta program delivery model, under a national umbrella, that meets the needs of Albertans. There is strong integration among mandates and organizations in the aquatic industry.

Particular challenges exist in the growing First Nations communities, with larger families, and often limited financial resources and lower educational accomplishment. Other communities that are located close to major resource development projects have less economic constraint. However, in these communities there is a different view of recreation and culture. It is appropriate that First Nation people continue to be encouraged to pursue education and training to assume responsibility for management, planning, programming, and facility operation.

Municipal employers have reduced the number of entry level jobs. Also, many responsibilities in community recreation have been assigned to not-for-profit organizations.

The commentary in the following paragraphs provides a combined perspective for community recreation, community development, and aquatics. However, within the context of the priorities for this research, the survey data and industry interviews indicate that there are many similarities in the labour market environment facing community recreation and development and aquatics.

Innovative approaches are required to providing recreation facilities and programming in light of expected demand increases.

Survey Response

A total of 245 survey responses were received in this area, constituting 56% of the overall survey response. Most of the survey respondents were municipal government organizations (see Table 7.1). Fifteen industry interviews were conducted in this segment.

Table 7.1 Types of Organizations

Type of Organization	Number of Responses
Municipal government agency	205
Not for Profit Society	29
Private sector, educational institution, other	10
Provincial government agency	1

The respondents' organizations were evenly divided between those serving urban markets and those serving rural markets. Geographically, they were widely distributed throughout Alberta. Their primary focus is shown to be one-third activities, entertainment, events, and festivals, one-third facilities, parks and the environment, and most of the remainder in community development or community administration.

Approximately 60 of the responses were from individuals whose education or certification includes an aquatics focus.

Key Influences for the Future

Influences that will affect this segment of the industry during the forthcoming five to ten years are focused on the balance between increasing demand and the ability of the organizations to continue to meet those demands. Demand changes, industry trends, and demographics are clearly a major influence and funding challenges are expected to influence the ability of the organizations to respond. Expected demand changes are not only associated with increasing population. They are also expected to reflect cultural diversity, changing participation methods (e.g., drop in participation, 'big-box' recreation, modular or flexible space allocation) and innovation and new trends in recreation activities.

Facility operation is a significant responsibility in this segment of the industry. Alberta's recreation facilities include dedicated recreation facilities, such as swimming pools, arenas and ball diamonds, and multi-use or shared facilities, including exhibition facilities and school gyms. Demographic and recreation trends will lead to increasing utilization of most of these facilities. Many of the facilities are already at capacity and are showing significant signs aging. Operating costs are increasing, although recreation budgets may not be and, in some cases, that results in reductions in programming and staffing budgets to accommodate increases in facility operating costs. Perhaps leading a trend for the future, all new recreation facilities in Calgary are operated on a business enterprise model as not-for-profit businesses.

New facilities will need to be built to provide for needed new capacity, with increasing staffing required for operations and programming. Interviewees expressed concern that as there is a limited supply of new employees, the employees who are recruited to work at new facilities will come from older facilities, which will then be unable to recruit appropriately qualified replacements.

One-third of the respondents in the survey expect continued challenges in funding and operating revenue. Industry experts acknowledge that the industry should focus more on streamlining and finding innovative financial approaches to accomplish their goals. Core services have been reduced through successive funding reductions and need to be rebuilt. Processes and operating systems will be challenged as people look for new ways to accomplish goals and new goals to accomplish.

Optimizing productivity therefore remains a significant challenge. This can be accomplished with a strong emphasis on skill and knowledge development. Employers need to strongly encourage their employees to enhance particularly their management related skills and to use them. Interestingly, the research reveals that the opportunity to learn new skills is a key component of motivation for employees.

The funding challenge translates into difficulties in providing competitive salaries and wages in Alberta's very competitive labour market. Other major financial challenges include meeting the costs associated with aging infrastructure, increased operating costs (for example, for insurance, utilities, and risk management).

The survey response and the industry interviews demonstrate clearly that industry must continue to pursue appropriate positioning and identity for recreation, both in the political environment and with respect to related mandates that often compete with the recreation industry for profile, money, and employees. This was interpreted in the industry interviews by the comment that recreation professionals are seen as practitioners and must re-establish themselves as professionals.

Part of the issue of positioning is also concerned with the relationship of recreation, facilities, and programs to the private sector. This relationship offers significant opportunity to address future needs. In this relationship, priorities for each partner must be clearly understood in order for mutually beneficial alliances and partnerships to develop. An entrepreneurial approach will be essential for the industry to continue to pursue its goals in the changed political-economic environment.

The stature of the industry is a function of the balance of the focus of government and the public on fitness, recreation, sport, and health priorities. The industry experts showed that recreation delivers on a huge mandate that is intertwined with many related mandates.

The challenge of appropriate education, training, and supply of trained employees was identified as another challenge. Students concluded in their focus group discussions that recreation offered a career opportunity for them to 'make a difference'. However, some noted that they entered a recreation education because it was perceived to be easy to get into and complete. However, these perceptions, as well as their attitudes about recreation as a career, changed as they progressed through their education and work experiences.

Some industry experts believe that the industry faces a significant challenge as an aging population of employees retires but younger candidates have chosen other careers due to their perception of the value and credibility of a recreation career.

As the industry continues to work towards appropriate positioning, its experts expect the vision and reality of recreation as a career choice will become elevated. This is a consistent theme of discussion, which the industry must continue to address aggressively. The industry should embrace relationships with other industry mandates and bring about strong strategic alliances focused on mutual benefit for the stakeholders and the partners.

Employers in the industry will need to recruit well-rounded candidates who bring the skills and knowledge appropriate to achieving progress and developing and implementing innovative solutions to challenges of leadership and recreation planning and delivery. Thus education and training programs will need to balance skills, knowledge, and attitude. Practical approaches, leaning to Alberta's strong priority of community development, should be integrated into the learning process.

However, the increasingly competitive labour market trends associated with population aging (less potential candidates under 25 years of age to serve more people in older age groups) and economic growth (increasing competition for employees) will constrain the ability of this industry to continue to recruit new leaders and highly motivated employees.

The large involvement of volunteers allows the industry to provide much programming that could not take place otherwise. However, volunteer management strategies must address recruitment challenges, consistency, and skill levels as volunteers contribute their time and expertise. Often the volunteers in supporting and programming roles are not trained. As concerns for risk and liability continue to escalate, the involvement of volunteers is expected to change.

Risk management is increasingly a high priority in the industry. This results in increasing cost and the need for high accountability. Programming and facility operations are all changing as a result of elevated awareness of quality assurance and risk management issues.

Community development is a key component of lifestyle and economic development. In Alberta, community development is a core priority of government. The industry interviews suggest recreation education and professional development programs should therefore prioritize community development training and education because of its strong integration with recreation.

Industry experts indicate the importance of a focus on First Nation populations. Active living and competition are intrinsic in aboriginal lifestyles. Large populations of young people, often living in urban communities, participate in a variety of recreation activities. They would benefit significantly from a focus on developing recreation leadership skills among First Nation people.

Several industry experts expressed concern that this segment of the industry delivers programming for a diverse population but lacks cultural diversity among its employees because applicants have not come forward. Strategies should be developed to encourage a broader intake of aboriginal candidates, as well as candidates from visible minorities, for recreation education and employment.

Industry leaders point to the success of innovation and financial independence as key foundations for the future of the industry.

Employment Trends

Employment trends in this segment of the industry are quite similar to those faced in other segments. They include challenges with recruiting qualified candidates, attracting the candidates, inability to pay competitive salaries, and high turnover.

Attrition was stated to be highest in programming, retail/customer service, and leadership or interpretation jobs. It was reported lowest in general management and marketing.

This segment of the industry expects its number of employees to increase significantly during forthcoming years, with the highest rates of growth among programmers, leaders, skilled trades, and marketing.

It is clear from the industry interviews that employees in this segment, as in others, are being expected to increasingly do more, but with fewer resources. That leads to a priority for strategic thinking and strong management skills. Strategic and visionary leadership is required to maintain the focus on solutions.

Employment Characteristics

Nearly 60% of the respondents indicated that they regularly work unpaid overtime and more than one-third regularly work evenings and weekends, by comparison with much lower proportions who said they rarely work overtime and very few who regularly work paid overtime. For the program related employees, the inclusion of weekends and evenings in the work schedule is consistent with public expectations about the mandate of this segment.

More rural employers noted that they cannot compete with larger cities for employees because of their inability to offer competitive salaries and professional challenge. Jobs are often integrated with jobs in other industry sector mandates, such as social services. Consequently, the more rural employers often hire local people with lower levels of education and knowledge and train them on the job.

Industry experts commented that career progression may be limited for employees in several fields, such as pool and arena operations and that result in stagnation or increased attrition.

Human Resource Priorities

More than 80% of the organizations allocate budgets for training and more than three-quarters make work time available for employee training. Two-thirds of the organizations have job descriptions that define expected skills and training requirements. Despite these provisions, most of the organizations do not reward employees for accomplishing approved training programs.

Less than one-third of the organizations specify human resource development strategies in their business plans. Even fewer report the existence of a formal training plan for human resource development.

Progressive employers with human resource plans look to finding the most suitable candidates to fill specific needs today and to become dynamic leaders. Business and management skills are of primary importance. These employers note that these could be recreation graduates, if they have this skill set, or they could be from other disciplines. Given the right

combination of skills, knowledge, and attitude, the employee can learn many of the detailed recreation skills or hire programmers with appropriate knowledge.

Skill and Knowledge Gaps

The employers note the importance of enhancing skills in several key areas. These include team-related skills, leadership, customer service, and marketing. Other priorities for skill development include risk management, problem solving, conflict resolution and arbitration skills, computer skills, communication, creative thinking or innovation, and technical skills related to specific jobs. It is clear that these skill development priorities are focused on enhancing the organizations' general management or business focus.

The employers point to the importance to their organization and its execution of its mandate of skills in research and analysis, business or proposal writing, project management, negotiation, marketing, and budgeting/financial management as key components of meeting the challenges of growth they expect. They also identify quantitative skills as a priority. All of these areas were rated as higher priorities than recreation program-related skills. However, an industry expert noted concern about the potential loss of the accumulated knowledge base as older employees with long tenure retire.

They also note it is important to address skill development in teaching, training, and coaching, creative thinking and innovation, parks and facilities operations, and community development.

Key knowledge enhancement priorities include human resources management, volunteer management, health, fitness, and wellness. Good familiarity with these areas is a critical component of providing the level of programming and service that is expected by the population.

Other knowledge priorities important to the execution of their mandate include therapeutic recreation, entrepreneurship, and structural understanding of key recreation trends such as the foundations of recreation and the influence of life stage.

The employees also focus most on skill and knowledge gaps related to the management or business of their industry. Their priorities include group dynamics and team building, leadership, customer service, marketing and public relations, written and oral communication, and a variety of technical skills related to the job.

The industry experts stress the importance of innovation, strategic thinking, and entrepreneurial approaches to address the challenges facing the industry. They confirm the importance of providing employees with the management and program related skills and knowledge that are crucial to addressing the challenges faced by the industry.

Other key areas in which stronger skills and knowledge are required include human resource management and leadership, both central to meeting the challenges of the future. Further, due to the diversity of demand and the interaction with other sectors of the economy, recreation graduates must also learn about related mandates such as health, tourism, and culture.

Education and Training

The employers rated their satisfaction with the way in which education programs meet the needs of their organizations. The resulting ranking indicates the highest satisfaction with graduate programs, then post secondary degree programs, industry-delivered training programs, community colleges, and finally private education and training organizations.

Experiential training and behaviour-based interviewing and training tools are proposed by industry experts to contribute to successful delivery of these mandates in light of the increasing demand expected in the future.

While the importance of a liberal education is understood, industry experts believe that education for the individual is an investment in a future career and, therefore, it is important that education includes a clear focus on working needs. In this industry, the industry experts suggest that there is an insufficient return on investment (valued in salary opportunities) compared with other industries.

Several employers noted that interaction and learning partnerships with other municipalities or similar employers are effective in professional development and acquiring new techniques.

Several industry experts commented that recreation graduates were highly regarded in a wide range of related fields and often found good career opportunities outside recreation.

Learning Strategies

The preferred learning strategies of the employees were reported to be attending conferences and seminars, supported by self-directed learning and learning on the job. They were less inclined to prioritize courses at universities or colleges. Most of the respondents have completed their formal education.

The survey responses received in this segment are generally consistent with those for other segments. The employees reported a broad range of preferences for the delivery of professional development and training. The highest rated preferences were short seminars, preferably away from the workplace, formal in-house training, preferably using external instructors, correspondence or other distance learning, mentorship by a more experienced professional, and reading. While they also support courses at colleges and universities, they prefer these to be on the employer's time rather than their own.

From a structural perspective, the employees prefer experiential learning, regular interaction and guidance from an instructor, and modular programming to be completed at their own pace. They were least supportive of a campus or classroom environment.

Networking remains a high priority as a component of learning and professional development. Stimulating opportunities for networking and alliances between organizations delivering recreation should be a high priority for employers and industry leaders. Other professional development strategies should include seminars and workshops delivered by professional bodies.

In the aquatics environment, there is always demand for lifeguard training. The lifeguard society uses a third party delivery system to deliver training against pre-determined training standards. However, industry experts have expressed concern that the cost of this training may impede the induction of new trainees. This is because pay rates in the industry are not competitive with other jobs available to candidates and will not offset the cost of the training.

Industry experts in several segments of the industry recommend a collaborative and integrated delivery system that integrates educational institutions and industry employers to provide for the comprehensive needs of the future. Joint learning projects with other groups and agencies may contribute further to developing an integrated knowledge and skill base.

Barriers

As with other segments of the industry, employers indicated that barriers to human resources development are associated with lack of time, staff coverage, and funding, and the lack of suitable courses in the area. High staff turnover also presents a barrier.

Discussing the challenge of attracting employees to more remote locations, industry experts commented that employees trained, at high cost to the organization, subsequently leave for better opportunities.

The employees agree that the strongest barrier is time, indicating that this is associated with other family priorities. Some noted that their employer does not provide incentives.

A large proportion of employees frequently works unpaid overtime and regularly works on weekends and evenings. They indicated their priority learning strategies include attending conferences and seminars and short seminars. The industry interviews indicated that the time of employees in this segment is becoming increasingly congested. Their ability to pursue professional development is constrained by the combination of work priorities and decreasing personal time.

The Lifeguard Society has addressed barriers that have limited participation in that group by building a feeder system to stream new certification candidates.

Recreation Careers

As with employees responding in several other segments of the industry, the largest proportion joined the recreation industry as an economic option, rather than a career choice. They needed a job. A small proportion wanted to start their own businesses and saw recreation as a profitable industry.

As with the students who reported that they discovered the value of a recreation education after they entered a recreation education program, the research shows that these employees also became dedicated to recreation after the fact, as it were. In the survey, 72% responded that recreation is their chosen career path. A further 20% responded that they have made no decision on future employment in the industry. The remainder will be retiring in the next five years.

The attitude of the survey respondents towards their future career in recreation shows some satisfaction with the opportunities for advancing their career in recreation. They are extremely positive about the level of challenge and the opportunity to learn new skills. They are also positive about their working conditions. However, they are not satisfied with the socio-political status of recreation, the number of recreation jobs, income potential in the industry, or the quality of recreation jobs.

Many employees in this segment of the recreation industry hold technical certification. Several industry experts propose that professional certification should be initiated to add credibility for the industry, for the career and for the employees. Opinions were voiced that pursuing a professional certification strategy would result in re-examination of the core skills and identify areas of specialty.

Professional certification would elevate the status of the recreation professional and would lead to higher standards of professional development. Therefore, new hires into career track positions would need to be certified or eligible for certification.

Employee Recruitment

One-third of employees reported that they the recreation industry directly from studying in a university or college. One-in-eight joined directly from high schools. Others joined the industry from other public service careers, or from retail, wholesale, or distribution and the remainder from a wide range of occupations.

While the largest proportion entered the industry directly from their education, one-third reported that they had previously volunteered in the recreation industry. Responses illustrate the high turnover in this segment. They indicate that 40% of employees leave the industry early in their careers, by comparison with 23% who remain until their retirement.

Employers use a wide range of methods to identify job candidates for openings. The largest proportion post vacancies in newspapers, seek internal candidates, and maintain a job opportunities page on their website. Other priorities include postings with colleges and universities and involving employment assistance organizations. On-line job search services and agencies are used although external recruiters seldom are.

Employees prioritize job postings in newspapers and on websites, and referrals from friends or relatives as their leading job seeking strategies. They are less inclined to attend job and career fairs and to use external recruiters or headhunters.

Employees reported that their education and training made it easier for them to qualify as a recreation industry job candidate, although a smaller proportion of their employers specifically sought candidates possessing recreation industry education or certification. They were less inclined to agree that contacts from their education and training helped them to secure their recreation industry employment.

Employees graduating often have large student loans to repay. They must look for jobs where they will find salaries that allow them to meet their loan payments.

Several employers noted that they do not necessarily seek recreation graduates exclusively for career positions. They are more focused on the range of skills offered by the candidate relative to their needs. Graduates with a variety of education and experience histories may present these skills.

Retention Strategies

As larger employers, many of these organizations have clearly defined retention strategies. The retention strategies are focused on providing training and education opportunities, employee advancement and promotion, employee benefit packages, pay adjustments based on seniority, and rewarding outstanding work.

Consistent with that focus, the employees report they have received an increase in wage or salary (85%) the opportunity to learn new skills or knowledge (81%) and increased responsibility or promotion during their current employment. Nearly half of the respondents report they have received recognition for outstanding performance.

Nearly half of the respondents report they are very motivated to stay with their present employer. Professionals who leave the industry before retirement leave for senior jobs in other, often related, sectors or to pursue consulting opportunities. Staff leaving the industry often do so in order to work at other not-for-profit organizations, to go into human resource management settings, or to pursue opportunities with public service employers.

The employees agree with the employers on the priorities for retention strategies. Their view of successful employee retention strategies includes providing education and training opportunities, occasional rewards for outstanding work, and advancement opportunities. They also note the importance of enhanced employee benefits packages.

Employees in this and other segments of the industry note the importance of learning new skills as a key factor in employee retention. Several employers who were interviewed described well-developed internal training and professional development programs.

The industry is very strongly supported by volunteers. However, other sectors of the economy agree that volunteer time is increasingly limited as volunteers meet their own priorities. Executing strategies for retention of volunteers is particularly important for this industry.

The industry experts note the large number of part time jobs in this segment of the industry. Retention of part time employees appears to be a significant challenge. Many of the part-timers use recreation employment as their second job.

A concern was raised in the industry interviews that the industry used to take younger employees and mentor them to take more senior responsibility as they grew in their positions, but that happens less as career progression opportunities are less distinct and employees leave for higher paying work.

Rates of Pay and Employee Benefits

Salaries and wages paid in this segment of the industry are generally consistent with those paid in other segments. They may be a slightly higher in areas of general management and slightly lower in program related jobs. Particularly in the larger employers, pay rates may be more of a challenge for professionals than it is for skilled workers and other staff, where many collective agreements prevail.

Employers in this segment offer a full range of employee benefits. For example, nearly all of them have dental plans, pension plans, and other health or life benefits.

The Employees

On average, employees responding to the survey reported a working history of 14 years, eight years working for their current employer, and five years in their present position. Their normal workweek is conventional.

In this segment, 70% of the respondents were in general management jobs. Most of the remainder were in program related jobs, including programmers, leaders, and interpreters. Further, 85% were in full-time employment and most (92%) were on the permanent staff of their organizations.

The research shows that at their highest level of educational attainment, more than 50% of the respondents hold a post secondary degree and a further 6% a graduate degree: 26% hold a post secondary diploma or certificate. On average, they completed their formal education in 1991, consistent with the average for the industry.

The research shows that 62% of these respondents (slightly higher than the industry average) hold a formal recreation qualification or certification. Most of these hold post secondary or graduate degrees from a university or college. Most of the remainder have a community college diploma, or certification from a recreation industry association. The employees with formal recreation industry qualification or certification reported that their recreation education or certification had prepared them well for their work. More than 70% of the respondents are members of a professional organization or formal recreation industry association.

In this segment, 60% of the respondents were female. The respondents covered a wide range of ages, from 20 to 64 years, although nearly three quarters were aged 30 to 49 years. They were generally somewhat younger than respondents in other segments. Their overall annual income from their primary recreation industry job also covered a broad range, although they showed a higher propensity to be paid more than employees in other segments of the industry.

Job Satisfaction

As with respondents in other segments of the industry, the respondents in this segment expressed high overall satisfaction with their recreation industry careers. They rated particularly highly the level of challenge, their social and working environments, and the opportunity to learn new skills. They were less than satisfied with the number of recreation jobs available, the income potential in the industry, the rewards and recognition given, the quality of jobs available, and the social status of recreation employment.

Industry experts noted the importance of building respect for recreation as a profession and a career choice.

Conclusion

It is clear from the skill and knowledge gaps identified by the employers that organizations in this segment of the recreation industry are clearly focused on enhancing the management and business of their organizations. Industry experts explain that this is a function of finding new ways to accommodate increasing demands in light of the financial challenges that will otherwise constrain the ability of these organizations to satisfactorily deliver on their mandates.

Several of the industry experts noted the importance of innovation in pursuing strategic approaches to deliver on aggressive mandates. Addressing the skill and knowledge gaps identified by the employers and employees will facilitate that direction.

Section VIII. Other Industry Segments

The research also reviewed the labour market in several other segments of the recreation industry. These included education, professional services, and program administration. A small number of survey responses were received from people in each of these segments of the industry, which limits considerably conclusions that can be drawn about them. What follows consists of a few brief observations.

While they provide recreation education, educational institutions are also employers of recreation professionals. Employment for recreation professionals is dictated by the priorities and policies of the institution and the number of places available for students.

The work involves teaching, publishing, and research. Salaries and benefits are generally consistent with those in other segments of the recreation industry, although the positions are not directly comparable.

Entry opportunities tend to follow academic or business streams. Employees are encouraged to take continuing professional development and higher education.

A small number of consulting firms specialize in recreation, serving clients in the public and private sectors. The wide range of services provided includes marketing research, a variety of business, operational, and program planning, development services, and architecture. Most of these firms also serve other industries.

Generally, employment opportunities in these professional organizations call for higher education and, often, specialized certification. Salaries are commensurate with professional levels.

Typically, associations and program administration organizations provide direction, coordination, lobbying, and funding services. To fill vacancies they seek recreation professionals or other candidates with qualifications consistent with the needs of the organization to fulfill its particular mandate.

Key Issues

The strategic direction of the industry must keep abreast of trends that influence the delivery of recreation. Some examples of new trends include the increasing need to address social issues, the role of technology as a new form of entertainment, increasing interest in extreme sports, popular culture influences, and dramatic demographic change.

This includes the education and professional development of industry professionals. To prepare professionals for the demands of the recreation industry, educators and trainers need to work closely with industry players to develop integrated programming that balances the priorities of liberal education and applied knowledge.

Professionals must be able to focus on a wide range of management issues, including risk management, health and fitness, parks and open space management, advocacy and lobbying, entrepreneurial skills, contracting arrangements, volunteer management, and media relations. They must be prepared to collaborate with related sectors and must understand political process.

Pay scales must be addressed to protect the industry from constantly being in recruitment and training mode. Job descriptions must be clearly defined to bring focus to responsibilities and professional definitions. Bridges need to be built to other sectors on specific initiatives and issues, and for enhanced delivery of programming. Risk issues must remain a high priority and the additional cost of certification in high risk areas need to be accommodated.

Section IX. Industry Expectations for Education and Training

Table 9.1, shows the assessment by employers of the importance of selected skills and competencies relative to their organization's mandate.

Table 9.1 Importance of Skills to Work Needs

Rating of the Importance of Skills to Work Needs <i>Scale is 1- 4, where 1 means "Not at all important" and 4 means "Extremely important"</i>	Overall Mean Rating
General Management/Business Skills	
Customer service	3.51
Problem solving	3.34
Communication (written and verbal)	3.25
Literacy	3.15
Computer or other information technology	2.93
Planning and evaluation	2.91
Administrative	2.74
Budgeting and financial management	2.68
Marketing, communication, and promotion	2.66
Project management	2.56
Negotiation	2.50
Skills requiring familiarity with numbers	2.47
Business or proposal writing	2.44
Research and analysis	2.22
Human Resources and Leadership Skills	
Team working skills	3.57
Customer handling skills	3.52
Motivation skills	3.28
Leadership, management, or supervisory skills	3.18
Program and event planning	2.93
Recreation activity leadership	2.83
Technical and practical	2.76

The data reflect the importance attributed to the possession by employees of a wide range of both hard and soft business skills. Skills for working with employees and customers are rated particularly important.

In general, a similar distribution of responses was achieved from employers throughout the industry segments. The in-depth interviews with industry experts support this analysis, indicating the increasing importance of business/management-related collaborative skills, leadership, and skills having to do with interpersonal relations.

Table 9.2 presents a similar analysis of the employers' expectations of the kinds of knowledge their employees should possess. The strong weight the respondents gave to all of these knowledge areas emphasizes the comprehensiveness of many recreation jobs.

Table 9.2 Importance of Knowledge Areas to Work Needs

Rating of the Importance of Knowledge Areas for Work Needs <i>Scale is 1- 4, where 1 means "Not at all important" and 4 means "Extremely important"</i>	Overall Mean Rating
Ethics	3.18
Working with diversity	2.91
Community development	2.90
Health, fitness, and wellness	2.87
Cultural sensitivity	2.87
Human behaviour	2.86
Park and facility operation	2.79
Inclusive leisure	2.72
Foundations of recreation	2.55
Environmental stewardship	2.53
Influence of life-stage	2.49
Legal issues	2.26
Entrepreneurship	2.21
Therapeutic recreation	1.91

Recreation Industry Education and Training Needs

The research describes the need for additional education and training from the perspective of the employers and the employees in the recreation industry. Overall, it is clear from both the qualitative and quantitative research that historically, existing education programs have produced well prepared employees in the industry. In fact, many recreation graduates have left the industry through promotion or to other jobs,

Skills and Competency Deficits

The following paragraphs identify skill and knowledge deficits from the perspective of both employees and employers in the industry.

Impact of Skill Deficits in the Industry

Respondents to the surveys and the industry experts included in the in-depth interviews all pointed to the changing business environment in the recreation industry. Amalgamation of responsibilities to achieve cost efficiencies, an increasingly demanding marketplace, and increased emphasis on business, management and partnership skills have each contributed to changing the nature of recreation jobs. Organizations and their employees need stronger skills in several areas in order to remain progressive. However, professional development is constrained by time and other priorities.

Priorities for Development

Table 9.3 ranks the desire of employees for skill development through professional development. The data presented in this table result from the analysis of open-ended questions in the survey and were strongly reinforced through the industry interviews. The table shows the importance of management-related skill development for the most significant proportion of the respondents.

As most of the respondents have graduated from recreation education programs or have significant relevant experience, it is not surprising that skills related to the practice of recreation are a lower priority. The industry interviews reveal that recreation jobs increasingly require strong business skills. The analysis in Tables 9.1 and 9.2 shows the management oriented priority of industry employers for professional development.

Table 9.3 Highest Priorities for Professional Development

Desire for new skills to meet requirements of present job - (Employees, unaided) % of respondents quoting this category as one of their three highest priority areas for skill development	% (N=192)
General Management/Business Skills	
Marketing and public relations	8.3
Computer or other IT	8.1
Budgeting and financial	8.1
General management	4.9
Project and contract management	3.8
Administrative	3.0
Risk management and safety	2.6
Planning and evaluation	2.1
Communication (written and oral)	1.9
Business planning	1.7
Research and analysis	1.5
Customer service	0.4
Consultation	0.4
Problem solving	0.2
Business or proposal writing	0.2
Human Resources Skills	
HR, volunteer management, supervisory skills	7.4
Teaching, training, or coaching	5.7
Leadership Skills	
Leadership	4.5
Negotiation and conflict resolution	3.4
Facilitation	3.2
Team working, team building	1.9
Motivation	1.5
Creativity, innovation, or conceptual thinking	1.5
Human behaviour	1.1
Customer handling and customer relations	0.4
Recreation-Related Skills or Knowledge	
Health, fitness, and wellness	2.3
Community development	1.9
Legal issues	0.4
Cultural sensitivity	0.4
Ethics	0.2
Inclusive leisure	0.2
Entrepreneurship	0.2
Working with diversity	0.2
Influence of life stage	0.2
Recreation Management, Operations	
Program and event planning and delivery	2.6
Foundations of recreation	1.3
Technical or practical	8.5
Park and facility operations and planning	3.6

The report from Phase Two of this project also identified this trend. Strong management skills are essential to meet the industry's challenges from increasing demands and growing competition for resources.

Preferred Delivery Methods

Asked about their personal strategy for professional development, a selected group of the employees responding to the survey suggested a combined approach incorporating learning on the job, "self directed" learning, and attending conferences and seminars. A smaller proportion (23%) indicated that their strategy includes taking formal education courses.

Table 9.4 summarizes the preferred delivery methods for professional development. Consistent with the more detailed analysis by industry segment, seminars and other modular programs are the overall preference for professional development delivery methods. Self directed programming is preferred by many, likely a reaction to pressing schedules and the fact that respondents have completed their education previously. The low rating of formal courses at educational institutions is likely related to the employees' extensive overtime and evening/weekend work, which limits time available for family priorities.

Table 9.4 Preferred Delivery Methods

Assessment of delivery methods <i>Employee rating on a scale of 1-4 where 1 means "Not at all suitable" and 4 means "Extremely suitable"</i>	Average Rating
Short seminars and workshops away from the workplace	3.14
Short seminars or workshops at the workplace	3.03
Formal in house training using external trainers	2.87
Programs with modules to be completed at own pace	2.73
Mentorship by a more experienced professional	2.64
Reading relevant publications and manuals	2.59
Internet	2.53
Formal in house training using internal trainers	2.51
Correspondence or other distance learning	2.49
Formal courses at an educational or training institution, taken during normal working hours	2.45
"Brown bag specials" (lunchtime or similar short seminars)	2.41
Formal courses at an educational or training institution, taken outside working hours	2.22

The research has shown that employees and employers want increased professional development to optimize progress in their employment but either cannot find the courses or cannot allocate the time or money to take them. Employees are focused on short, likely high intensity and very focused training that can be accomplished to meet their convenience.

Mentorship is shown as an important component of the process of professional development and career enhancement. The industry leaders included in the in-depth interviews and the students acknowledged the high value of mentorship as a developmental strategy. The secondary research also confirmed this value.

The employees' assessment of education and training methodologies shows preference for experiential learning and regular interaction with an instructor. Individual learning approaches, internet learning, and locally-focused methods follow closely behind. Campus environments were the least preferred method for professional development.

More detailed analysis showed that the respondents with a formal qualification or certification in recreation were slightly more inclined to favour the classroom environment and to acknowledge the value of the instructor.

Section X. Strategic Analysis

Overall, the research shows the extraordinary opportunity Alberta's recreation industry has to play a key role as a component of current and future trends in active lifestyles of Albertans, and in the development of active and sustainable communities in the province. Demand is increasing and changing as demographic and recreation industry trends turn to recreation priorities. Facilities and programs are expected to become increasingly busy. Industry leaders must position the industry and recreation professionals and practitioners to meet these challenges.

The research included the opinions of leaders, professionals, practitioners, other recreation industry employees, educators, and students. Conclusions drawn from the research are presented below. These are not prioritized but are grouped thematically for convenience.

The Recreation Industry

- Because priorities and trends in recreation and in related mandates and industries are constantly changing, the recreation industry is always evolving. That reality has characterized its history for many years. Its image and identity are naturally indistinct.
 - ARPA and its industry partners are aggressively pursuing the definition of the industry's image and identity.
 - The industry should continue to promote and establish awareness of its core principles and its economic value in concert with other mandates that rely on recreation's principles and practices.
 - The industry has powerful economic, health, community development, and lifestyle arguments. The Phase One and Phase Two reports provide context for that positioning.
 - Industry leaders indicate this may affect recruitment of new employees.
 - Some industry leaders, professionals, and practitioners are despondent following years of financial and 'turf' challenges and lack of recognition.
- Individual professionals and practitioners in the industry choose to study or work in recreation in order to challenge and meet the highest ideals.
 - The industry needs to continue to focus on its future and build strategies to pursue clear direction and established goals.
 - Clear messages to promote the industry and the profession are essential to arresting fragmentation and achieving growth.
 - Perhaps a branding change is in order as part of the redefinition of the core and extension of the industry. The recreation Matters campaign in Nova Scotia stands as an example of such branding.
- The industry is increasingly influenced by the need to be more focused on innovative management and business priorities due to increasing demand, limited financial resources, and competition for resources, customers/operating revenue, and employees.
 - Industry players note the critical importance of enhancing skills in management and business in order to meet the needs of the future.
 - Recommendations in this research will contribute to appropriate positioning.
- The industry is in fierce competition for resources, position, employees, and kudos. It needs clear strategies to promote its positioning. It is pursuing strategies to define and promote its value in a context that is appropriate to the vision of targeted audiences.
 - Industry experts stress that the positioning of the industry is crucial to attracting people to become students and to join the industry as employees.

- Budget allocations and organizational restructuring in the public sector have in many cases caused recreation services to contract and amalgamate with other functions.
- Partnerships and Alliances.
 - The industry and its professionals are involved with mandates in many other industries and professions.
 - Industry experts indicate that these alliances need to be clearly defined and formalized. The industry focus on partnerships and alliances will contribute to clarifying the role, expectations, contribution, benefits, and targeted markets of partners. The recreation industry players and their partners should celebrate their alliance.
- Industry Associations are focused on the specific interests of their particular mandate. They acknowledge that many of the issues they face are shared by other components of recreation, but they also note the distinct identity of their area of focus.
 - These organizations offer the opportunity for further alliances that would benefit the recreation industry and its positioning and would provide additional strength for area of focus of the associations.

Marketplace Trends Influencing the Industry

- Demographic Change, Industry Trends, and Market Evolution
 - Both the qualitative and quantitative research have shown that many of the factors that influence the recreation industry are outside the control of the industry. However, the industry has been stretched to respond to the expanding marketplace and increasing demand, due to funding and revenue challenges, aging infrastructure, payroll challenges, and organizational structuring. The industry acknowledges the need for innovation in funding and operations.
 - Key influences include the increasing, aging, and more demanding population, urban/rural population distribution, changing public priorities, and industry trends.
- Health, rehabilitation, therapeutic recreation, and active living
 - Increasing awareness and public promotion of the benefits of recreation in active living and restorative strategies has significantly changed and appears to have strengthened the role of recreation in the community, both directly and partnerships. Industry leaders should continue to pursue appropriate alliances.
- Specialization of recreation disciplines
 - Specialization has caused some disciplines that were previously a part of, or allied with, recreation to assume and promote their own identities. As the recreation industry identifies and promotes its core and peripheral disciplines appropriate benefits will accrue to the industry.

Industry Leadership

- The research shows that many industry leaders are aging and considering retirement or leaving the industry for promotion. The in-depth interviews raised significant caution for the industry in this respect. Many of today's leaders were the pathfinders of 15-20 years ago.
 - Industry experts note the importance of attracting and grooming young professionals to become leaders.
 - In many industries new leadership evolves as individuals progress in their careers and undergo professional development and mentoring. The current research shows that:
 - This industry loses its professionals early in their careers, significantly because of the balance of skills and knowledge they offer including particular strength in many aspects of human resources management and leadership.

- Due to constraints and organizational transitions over several years the intake of newly graduated professionals has been constrained.
- There has been limited access to, or availability of, professional development and mentoring.
- In newly evolving models professionals from other disciplines, including health, social services, municipal administration, and facility management, are taking leadership of recreation planning, programming, administration, and delivery.
- Recent reductions in the educational systems are limiting the number of new recreation professionals.
 - Strategies recommended through this research may contribute to enhancing the attractiveness of recreation as a career.
 - It is important for the industry to stimulate excitement, enthusiasm, passion, and vibrancy throughout the recreation and education systems.

Labour Market Trends

- Increased competition from all sectors results from expanded career opportunities and high pay offered by employers in other sectors of the economy.
- Ideals rather than salaries motivate recreation industry employees.
 - Employers and employees note the challenge of finding employees to work at a professional level or in certifiable occupations in the industry due to perceptions of a recreation career and low salaries.
 - Students and other employees join the industry to “make a difference”. The industry must find traditional and innovative ways to compensate and provide incentive for its employees at all levels.

Employment Trends

- The relatively low esteem ascribed to, and the often unclear vision of, the value of a recreation career was clearly described in the survey and in the qualitative interviews
 - As employees gain or focus on a recreation industry specialty, they find it easier to describe that specialty than to describe being a ‘recreation professional’. Thus, awareness of the specialties overtakes awareness of the recreation industry in general.
- The industry and customer base expects qualified, certified employees
 - Decreasing enrollment and reduced educational opportunities will limit the supply of appropriately qualified employees. Building a framework for recreation education is a key priority of this research. Strategies presented in this report are focused on increasing the production of qualified professional and practitioner workforces.
- There is significant mobility into and within the industry. However, it is significantly challenging for employers outside the major areas to attract qualified employees.
- Employees are well prepared for promotion to positions of higher responsibility that will employ their education, including skills and knowledge, and their values.

Existing Skill and Knowledge Base

- While employers acknowledge the quality of the existing education system to prepare employees for the recreation industry they consistently identify skill and knowledge deficits in several areas

- Stronger general management and business skills, customer service, leadership, and human resources management skills are evidently needed to drive this changing industry today and in the future.
 - This report recommends a new focus on professional development and a new educational framework, which together are expected to result in education and training more focused on the needs of the recreation industry.

Education and Training Environment

- A large proportion of jobs require formal education in recreation or related disciplines or certification for specific areas, mostly where public risk and liability exists.
 - Existing programs meet this need. However, educational institutions are decreasing the degree program opportunities, there are few diploma programs, and there are negligible private sector education and training institutions.
 - Recommendations in this report address certification of recreation professionals. It will be important for the industry to pursue employer recognition of the standard.
- Graduates of recreation education and training programs are acknowledged by their employers to be well prepared in many areas. Notably the employers point to several areas where stronger skills and knowledge would be of benefit:
 - Execution of the framework and priorities for education and training outlined in this report will build momentum towards satisfying the needs and expectations of the employers and the employees.
- Professional development is constrained by distance, time, and money and by the availability of suitable programs
 - Although employers generally perceive the value of professional development (including skills and knowledge) for their employees, limited financial resources, time pressures, and their inability to provide work coverage for employees engaged in training constrain access to professional development or upgrading.
 - There are limited programs available for professional development for recreation industry employees.
 - Rural communities and not for profit organizations are particularly limited in this respect. In turn, that has the potential to limit the growth of professionalism and progressiveness in those constituencies.
 - Innovative as well as traditional methods of providing professional development are recommended, based on the input of the industry and other research.
- There is a difference between the focus of higher education and training.
- Despite the efforts of some educators in this respect, there is a measure of “disconnect” between the educators and trainers and those in the field of practice. Other priorities within the educational institutions influence curriculum planning.
 - The consequence of this disconnect is shown by the consistency with which the employers and employees described their needs for additional skills and knowledge.
 - This research recommends enhanced interaction and communication to “re-connect the disconnect”. A commitment to this mission by all key constituencies is vitally important.

Education and Training Needs and Expectations

- The industry must ensure it has a strong resource of individuals appropriately positioned for leadership. They must build the appropriate alliances and partnerships with related mandates, to meet the needs of its marketplace and to deliver effective and safe facilities, programs, and events.

- Enhanced programming is needed for education; more programs and better access are needed for professional development.
 - A new focus on professional development is important and is framed in this report.
 - Programs need to focus more on business, management, and human resources skills.
 - Innovation and progressive thinking are also important priorities to build leadership.
- Innovative delivery and content are important to stimulate a vibrant educational and training environment.
- Easier access to training and education.
 - Training and education with modular programming, shorter seminars or courses, and self-managed strategies must be equally accessible to urban and rural employees.
 - Training needs to be less expensive.
 - Financial constraint in many organizations and for many individuals limits access to training and education.
 - New graduates cannot pay back large student loans on low wages.

This approach will bring new recognition to the profession and practice of recreation and the recreation professional.

Industry Segments

- There is remarkable consistency between the four primary industry segments with respect to the industry's labour market and education and training needs. However, there are marked differences between the labour environments among different types of employers. These relate to rates of pay, organization structures, human resource strategies, and recruitment.
 - Not-for-profit organizations are often partially funded by government and must meet government criteria, which should remain sensitive to the very different economic circumstances of these organizations.
- These differences point to reasons why private sector and not-for-profit organizations experience such difficulty finding and hiring qualified and experienced employees.
 - Many not-for-profit organizations are staffed and directed almost exclusively by volunteers, often with only one part time or full time employee to act as executive director, communications officer, lobbyist, secretary to the Board of Directors, administrator, receptionist, and chief financial officer. Often, the role of that employee is more focused on association management than on the recreation industry.
 - Again, rural and more remote communities are further disadvantaged in this respect.

Recommended Education and Training Framework

- A framework for education and training is recommended that can position Alberta as a leader in recreation education and training. The framework is based on the research conclusions and on the best practices and innovation identified through discussion with widely acknowledged industry leaders. The framework addresses the following key issues:
 - Creating a climate of innovation, excitement, and action
 - Identifying, empowering, and supporting leadership development
 - Determining, identifying, and improving image
 - Strengthening internal structure and working relationships

- Strengthening external partnerships and alliances
- Improving coordination of training programs and services
- Developing and maintaining vehicles for communication
- Improving access into and throughout the system
- Developing programs and services to fill gaps in education and training.

Section XI. The Role of ARPA

The research identifies or reinforces several opportunities for ARPA to continue its leadership role in the industry. Strategic recommendations for these are described in the proposed Recreation Education and Training Framework and the related action plan.

Urgent action is required to pursue human resource development strategies. Opportunities exist for ARPA to initiate these actions directly, or to facilitate them among industry players.

Based on conclusions drawn from the research, the following notes summarize that strategic direction. ARPA should:

- Continue to enhance the positioning of the recreation industry and recreation professionals to government and related industries.
 - Pursue partnerships with related industries to build strong identity for recreation mandates and to promote the role of recreation career professionals in those industries as integral to their successful pursuit of their own goals.
 - Facilitate clearer definition and increased awareness of recreation jobs and careers to enhance the perception of the value of recreation professionals. Particular priority might be assigned to related mandates.
 - Initiate inter-agency learning opportunities.
 - Encourage education programs that focus on related mandates to integrate recreation education as part of their curriculum.
- Establish an Alberta Recreation Industry Human Resource Development Strategy to induce employers to prioritize employee motivation and enhance employment conditions. The industry has to respond to increasing growth, but employees are not satisfied with wages and the number of jobs. The number of jobs is forecast to increase in the future but economic circumstances of the industry are expected to remain a challenge.
 - Facilitate industry action to initiate refocusing and growth of recreation education programs; Facilitate closer integration between educators and industry employers.
 - Facilitate laddering and other integration strategies addressed in this report to facilitate stronger integration of education mandates.
 - Develop a volunteer management and retention strategy.
 - Develop a cultural diversity program to stimulate the interest of candidates from a broader cultural background.
 - Facilitate an alliance of not-for-profit organizations to address employee benefits, compensation, employment strategies, training, and strategic planning.
 - Develop a workforce strategy for the industry to address the needs of the growing aging population and increasingly competitive labour market.
 - Initiate an ARPA “fee holiday” for new recreation graduates so they get involved in ARPA immediately on graduation.
 - Promote the use of the ARPA website job posting pages as a primary recruitment tool.
 - Initiate a “buddy” program to link recreation industry organizations for mutual benefit.
 - Facilitate a leadership conference.
- Develop a certification program for recreation industry professionals.

- Initiate first a voluntary certification program.
- Document a common body of knowledge and standards for a two-tier certification program focusing on core competencies and specialty themes.
- Pursue establishment of a formal program.
- Establish a professional development mandate.
 - Build an Alberta recreation industry mentorship network.
 - Establish a “roving counselor” program to deliver management development programming to more remote locations.
 - Initiate a formal mentoring program (one year assignments).
 - Initiate a roster and program to promote the use of industry leaders as guest speakers at educational institutions and conferences.
 - Initiate a community development theme into recreation education and professional development – a focus on community building.
- Establish a training center.
 - Facilitate with educational institutions, or deliver, a program of management and business training.
 - Develop an on-line, modular technical training program.
 - Build and deliver a portable seminar series, with certification options.
 - Expand the regional workshops program, focusing particularly in the management and business skills identified as priorities through this research.

Certification of Recreation Industry Personnel

This research shows clearly the importance of enhancing the recognition of the recreation industry and its professionals as a part of the foundation for the future identity and strength of the industry and to build strong leadership and a stream of appropriately prepared human resources. These are key components of the rationale for certification of industry professionals.

There are divergent opinions on the issue of certification of recreation professionals. There is no argument that certification is appropriate and indeed essential in areas of liability or risk. Responding to that need for specialized training and certification, segments of the industry (e.g., aquatics, facilities operations, etc.) are responsible for their own certifications rather than education institutions. Independent organizations, such as Alberta Recreation Facility Personnel, Alberta Fitness Leaders Association, and several other organizations establish and provide appropriate levels of training and certification.

This research concludes there is a strong argument for the certification of recreation industry professionals through a program of accredited educational institutions. However, discussion with respect to the general certification of recreation professionals is polarized. For example, many of the industry experts interviewed in this research suggest that a certification process might be effective in the strategy to raise the awareness, recognition, and prestige of a professional recreation career. Val Mayes, (*University of Alberta, n.d.*) in preparation for a Masters Degree, noted with clear rationale the need to have a flexible system rather than one where people must be certified.

The current research supports the need for clarity in identifying recreation professionals as a part of the raised profile of the industry. This is important today and will be increasingly so as the demand for professionals increases and competition for those resources from other industries becomes stronger with an increasingly tight labour market.

It is reported that Saskatchewan and Quebec universities are beginning to focus on achieving the standards set in the United States by National Recreation and Park Association and its State affiliates. The NRPA provides the designation

'Certified Park and Recreation Professional'. Alberta can provide leadership in this respect. An Alberta solution may initiate a national trend toward certification. Such a designation should eventually be transferable within Canada and, therefore, it must be accepted in other jurisdictions. Programming at the educational institutions would need to be considered accordingly.

The NRPA accredits 100 programs at selected universities as part of the preliminary certification process. Criteria for certification include a post secondary degree from one of the accredited programs and passing an NRPA examination. Alternative approaches to certification are available for those with other degrees. NRPA offers study guides and other benefits for individuals pursuing this designation. In most States the State Parks and Recreation Association administers this three-tiered program.

Industry representatives not favouring certification, suggest that it is an unnecessary process that would have limited value but would consume the time and energy of an already over-stressed workforce of under-paid professionals.

Several of those not favouring a new certification are advanced in their careers and perceive it to be unnecessary for them to pursue new qualifications. Many have completed their education many years previously. Organizations initiating new professional certifications often provide 'grandfather' certifications for those with an appropriate combination of academic qualification and experience. 'Grandfathering' is important as there have been numerous people engaged in professional activities for years, and this mechanism will recognize their efforts and bring them on board with certification - they in turn will act as leaders and mentors for new professionals.

The opinion was presented that a recreation professional certification process may lower the standards of post secondary education to a 'least common denominator' – the fear is that educational standards may be focused on a 'passing grade' rather than 'excellence'. Discussions with Alberta educators indicate that this would not occur.

As this is a contentious issue, it is recommended that the best way to introduce it is as a voluntary initiative in the first instance. It may serve as a vehicle to keep people working in the industry if they see it as a motivator to keep current in professional practice. There is presently no mechanism to motivate employees through professional development activities, and for those that do pursue professional development, there is no reward professionally for their efforts. Initiating a professional recognition program through certification would allow recognition and supply motivation for professional practice. It would also assist employers to clarify their employment requirements and be focused in hiring searches.

Based on the research conducted for this project, on the success of other professional certification programs, on the success of technical certification programs, and on other research on this topic in Alberta, it is the opinion of the consultants that certification of recreation professionals would be a valuable step forward for the industry. Certification would pursue several goals that might be set to address challenges facing the industry:

- Raise the perceived recognition, status, and respect of recreation professionals among employers in the recreation industry and in other industries.
- Develop a clear definition of core competencies for the recreation professional and the competencies associated with recreation specialties.
- Enhance employment opportunities for professionals as employers learn about the profession of recreation.
- Make recreation careers more attractive to industry or education candidates as they will see a career path and clear definition of the profession.
- Elevate recreation as an industry in its political and competitive marketplace.
- Bring new focus to professional development.
- Motivate universities to write examinations focused on the needs of the industry.
- Provide measurable standards for the industry.

The research revealed some concern that recreation professionals work in many industries related to recreation and that it may be difficult to define the professional competencies. Several existing professional institutes accommodate this

challenge in their industry by multi-part certification, starting with clearly defined core competencies and leading to specialization certification. The Canadian Association of Management Consultants (www.camc.com), and the provincial institutes have developed programming with international standing for an equally challenging environment.

Typically prerequisites are a post secondary degree and a period of relevant working experience, leading to certification examinations and a recognized designation. Certification requires examination and acceptance of qualification from an accredited or acceptable education institution.

A two-part certification program would accommodate the diversity of recreation careers available to professionals. Part One would be a general recreation certification based on core competencies that are common to all recreation needs. Part Two would be a specialty examination focused on one of a selection of recreation specialties.

There would be many beneficiaries of a certification program for recreation industry professionals. These are expected to include:

- Employers would recognize the professional nature of the recreation industry and would prioritize selection of certified professionals accordingly.
- The recreation industry marketplace, the general public, would acknowledge the value contributed by recreation professionals.
- Individuals would be motivated to remain in the industry and would be recognized for their professional focus – the vision and reality of a recreation career would become clearer.
- Professional development programming would become more focused and those aspiring to a career as a recreation industry professional would have clearer direction.
- Career opportunities would become increasingly attractive to existing and future employees and would attract more students to pursue a recreation education.
- Related disciplines and mandates would have a clearer understanding of the role of the recreation profession
- Employers, employees, students, educators, trainers, and the general public would become more aware of the core competencies held by a recreation professional.

It is recommended that ARPA assume the leadership of this thrust to certification. ARPA is central to all of the key constituencies and stakeholders, it is independent and focused solely on the good of the industry, and it is well positioned through many research projects and through industry liaison to comprehend all of the key issues. Further, through the strategies proposed in the Phase Four report, it is recommended that ARPA also lead the process of enhancing professional development for the industry and the certification strategy is a part of that process.

Implementation of the certification program is addressed further in the Phase Four report.

Section XII. Conclusions and Recommendations

Albertans are known for thinking big and being bold. The recreation industry needs to adopt this tenet.

Access to recreation and the health benefits of an active lifestyle and vital active and sustainable communities are critical to the lives of Albertans, and, in concert with employment and education opportunities, are a fundamental part of the 'Alberta Advantage'. People choose to live and do business in Alberta for these reasons.

The labour market and education and training challenges identified in this research can be addressed through a consistently applied strategy. Detailed recommendations are provided throughout the Phase Three and Four reports, and address the labour market, education, professional development, and the role of ARPA. These recommendations are summarized below.

Key Conclusions	Recommendation
Hiring and compensation of employees is challenging due to the competitive labour market and demographic trends.	Facilitate industry cohesion about the labour market and execute strategies described in this report to enhance career attractiveness.
There is a perception in the industry that recreation professionals are not valued highly enough and that affects candidates planning careers.	Initiate a recreation professional certification program, clarify jobs, and position and promote professionalism.
The industry needs professional development focused significantly on management and business skills.	Implement the Alberta Recreation Industry Education and Training Framework and Plan described in the Phase Four report.
The recreation industry's positioning affects recruitment	Continue to define and promote the industry's image and identity and pursue strategic positioning, partnerships, and alliances for the industry.
'Disconnects' exist between education and the field of practice, resulting in a reduction of recreation education programs and alternative educational priorities.	Facilitate re-connecting the "disconnects" through industry-educator and educator-educator integration strategies and feeder systems described in this report.
Alberta has the opportunity to take a leadership role in recreation education, training, and certification.	Adopt innovative best practices described in the Phase Four report to make the recreation education and training system flow and to retrieve Alberta's position as an acknowledged leader in recreation education and training.
Funding for operations (including staffing and training) is limited.	Facilitate industry strategies seeking innovative revenue solutions.
Opportunity abounds – so do barriers.	Think big, be bold.

Afterword

This project benefited enormously from the work of a *Project Advisory Committee* consisting of individuals from private, government, and not-for-profit organizations in the Alberta recreation industry. These individuals freely gave their knowledge, experience and time to help direct the work of the consultants. Their names and institutional affiliations are listed below. The Alberta Recreation and Parks Association is grateful for their assistance.

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Appendix 1: Recreation Industry Position Descriptions Resulting from the Job Content Analysis

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Community Development Practitioner

Community workers encourage and assist community groups to identify their needs, to participate in decision-making and to develop appropriate services and facilities to meet those needs.

Duties

- Assist community groups in planning, developing, maintaining and evaluating community resources, programs and support networks
- Support, develop and evaluate strategies that encourage community participation in activities
- Research, analyze and assist various stakeholders in developing community service policies
- Communicate effectively with community groups, welfare agencies, government bodies, non-government organizations and private businesses about community services such as housing, health, welfare and recreation
- Monitor, evaluate and recommend changes to community development programs, policies, practices or budgets
- Help raise community and public awareness on issues such as welfare rights by promoting, organizing and/or helping to coordinate meetings and seminars
- Carry out administrative work, which may include written correspondence, preparing submissions and reports for government bodies or other agencies and attending management meetings.

Working Conditions

The work of community development practitioners involves considerable personal contact and travel within communities. They are normally expected to attend evening meetings and occasional weekend activities.

Personal Characteristics

- Enjoy assisting people
- Able to work independently
- Able to work in cooperation with others
- Good work organization and time management skills
- Able to relate to people effectively and patiently
- Able to manage and help resolve conflict
- Able to understand the issues and interests of the communities involved
- Good oral and written communication skills

Educational Requirements

- Post-secondary degree or certificate in Recreation, Child and Youth Care, Social Work or a related discipline

Other Requirements

- Clean Criminal Record Check
- Project management experience preferred
- Board Development courses, facilitation courses, Safe and Caring Schools and Communities courses (<http://www.learning.gov.ab.ca/safeschools>) , Virtues (Character Education) and Lions Quest (<http://www.lions-quest.org>) may be recognized and improve professional practice.

Salary

This position pays between \$30,000 and \$45,000 annually.

Youth Program Coordinator

Youth Program Coordinators are responsible for creating and maintaining positive and empowering recreation opportunities for youth that promote personal and professional development.

Duties

- Liaise with community organizations, boards, committees and mentors
- Prepare and facilitate workshops and group projects
- Recruit, interview and assess potential participants and mentors
- Assist with funding applications
- Develop an inventory of youth participation programs and models
- Work with various stakeholders like community groups, police, and government ministries to facilitate youth development
- Recruit and train of volunteers
- Organize special events
- Manage and control financial resources and budgets
- Provide program documentations and evaluation
- Supervise staff and volunteers
- Promote and market programs and services

Working Conditions

Youth Development Coordinators may work weekends or evenings. A great deal of time is spent networking with other organizations for support, funding, volunteer recruitment and promotion.

Personal Characteristics

- Excellent oral and written communicator
- Work effectively with multiple stakeholders
- Strong problem solving skills
- Self-directed and flexible
- Excellent team player
- Model effective leadership skills under stress
- Comfortable in front of a group and in presentation delivery
- Organized and able to multi-task
- Able to motivate and inspire others to action
- Committed, creative, resourceful and enthusiastic

Educational Requirements

- Post-secondary degree or certificate in Recreation, Child and Youth Care, Social Work or a related discipline
- Standard First Aid or better

Other Requirements

- Valid drivers license
- Clean Criminal Record Check
- Proficiency with Microsoft Office Programs
- Experience working with youth preferred to several years required
- Project management experience preferred

Salary

This position pays approximately \$30,000 to \$45,000 annually.

Youth Centre Manager

A Youth Centre Manager is responsible for coordinating the operations of a youth center, as well as overseeing the development and implementation of recreational programs and liaising with community organizations.

Duties

- Supervise and coordinate operations, programs and services
- Hire, train and supervise staff
- Develop strategic planning documents
- Formulate policies and procedures
- Manage financial statements and budgets
- Work with an advisory board or council
- Promote and market the youth centre within the community
- Evaluate programs and services
- Develop and maintain partnerships with community stakeholders
- Respond to issues and complaints

Working Conditions

Youth Center Managers may work weekends and evening, usually within an indoor environment. However, they may be required to oversee and evaluate outdoor programs. They spend a large percentage of their time working with staff or community members.

Personal Characteristics

- Excellent oral and written communication
- Comfortable speaking with or facilitating to a group
- Self directed
- Team player
- Organized and task driven
- Able to communicate effectively with multi stakeholders
- Flexible
- Possess good judgment
- Able to multi task and meet deadlines
- Remain calm under stress

Educational Requirements

- Diploma or Degree in Recreation or related field
- Experience in community recreation or an equivalent
- Experience in managing a special purpose recreation centre preferred

Other Requirements

- Valid drivers license
- Clean criminal record check
- Proficiency with Microsoft Office Programs such as Word, Excel, FrontPage, Power Point and Access

Salary

Salary for this position is \$30,000 to \$45,000 annually.

Fitness/Wellness Program Coordinator

A Wellness Program Coordinator provides leadership and acts as a resource person in the planning, coordination, promotion and implementation of wellness and fitness programs.

Duties

- Monitoring revenues and expenditures
- Providing financial cost/benefit analysis of various services
- Promote services and identify opportunities for future development
- Liaising with staff, management and community groups and agencies
- Develop a resource base of Wellness Program models from other organizations and communities
- Conduct research and analyze data to develop appropriate services for target group
- Promote Wellness program among target group
- Write reports and present program evaluations to the board or advisory committee
- Responsible for marketing and promotion
- Hire, train and supervise program staff
- Plan and administer programs

Working Conditions

This position may involve weekends and evenings. It may also involve some minor travel within the community or region.

Personal Characteristics

- Effective and motivational leader
- Model a healthy lifestyle
- High-energy
- Excellent oral and written communication skills
- Customer service orientation
- Organized
- Self-directed
- Team player who works toward collaboration
- Flexible and adaptable

Educational Requirements

- Minimum Diploma or Degree in Recreation, Business Administration, Sport Administration or related discipline
- Considerable knowledge of the philosophy, objectives, principles and practices of wellness fitness and healthy lifestyles

Other Requirements

- Valid drivers license
- Clean criminal record check
- Current Standard First Aid and Basic CPR
- Experience in supervision with a background in programming preferred
- BCRPA registration as a Supervisor of Fitness Leaders may be required

Salary

Annual salary is in the \$30,000 to \$45,000 range.

Theatre Manager

Theatre Managers promote the performing arts within a community and manage the day-to-day operations of a theatre facility including scheduling of events, negotiating contracts with performers, supervising staff and delivering productions.

Duties

- Schedule and program theatre events
- Oversee technical set-up for events
- Develop partnerships with local associations
- Promote and market facility
- Negotiate and contract with performing artists
- Manage financial statements and budget
- Hire, train and supervise staff and volunteers
- Conduct research to determine community preferences for performances
- Develop policies and procedures
- Report to the Operations Board or Advisory Committee

Working Conditions

Theatre environments are often dynamic and theatre managers are in contact with a lot of people on a day-to-day basis. This position may require weekend or evening work and is performed indoors. Theatre managers often work in a high profile environment with continuous public exposure and deadline pressure.

Personal Characteristics

- Excellent oral and written communication skills
- Ability to manage and work within a large budget
- Able to work effectively with multi stakeholders
- Public speaking and presentation skills
- Self directed
- Team player
- Organized
- Able to represent the theatre professionally to community organizations and the media
- Comfortable working with diverse populations
- Sound judgment with the ability to respond quickly to emergent situations
- Strong marketing and public relations skills

Educational Requirements

- Diploma or Degree in Recreation administration, Arts, or Cultural Administration with an emphasis on management or facility operations.

Other Requirements

- Performing arts facility management experience
- Experience in Theatre Technical Systems
- Experience with special event management

Salary

Not mentioned in the job descriptions.

Special Needs Program Coordinator

A Special Needs Program Coordinator develops and implements programs designed for individuals with mental or physical disabilities.

Duties

- Assess abilities, preferences and interests of participants
- Plan, implement and evaluate recreational programs for individuals with a variety of mental or physical disabilities
- Modify recreation activities or environments to create recreation opportunities
- Manage and maintain a budget
- Hire, train and supervise staff
- Recruit and supervise volunteers
- Liaison with community organizations
- Promote and/or market the program
- Write reports, evaluations and press releases
- Develop and facilitate workshops
- Resolve conflicts with parents and guardians of minors
- Develop and maintain policies and procedures

Working Conditions

This position may involve lifting and physical exertion. Flexibility is needed to work weekends and evenings. A Special Needs Program Coordinator may work in both indoor and outdoor environments.

Personal Characteristics

- Excellent oral and written communication
- Ability to lead or facilitate groups effectively
- Excellent interpersonal skills
- Be a team player
- Self-directed
- Can relate easily to individuals with physical or mental challenges
- Organized
- Flexible, adaptable and patient

Educational Requirements

- Degree or Diploma in Recreation Administration, Child and Youth Care, Physical Education, Human Service Worker or related discipline with coursework in program planning, assessment, and leadership for people with disabilities.

Other Requirements

- Standard First Aid and CPR
- Experience with mentally or physically challenged individuals preferred
- Valid drivers license
- Clear criminal record check may be required
- Excellent computer skills in Microsoft Office programs such as Word, Excel, Access, and Power Point

Salary

Annual salary for this position is between \$20,000 and \$35,000.

Recreation Programmer

Recreation Programmers plan, implement and evaluate recreational programs that meet the needs of diverse community populations.

Duties

- Research trends in recreation participation
- Assess needs of constituents
- Design program offerings
- Develop programs including theme, schedule, objectives, venue, leadership, evaluation, etc
- Ensure leadership and supervision of staff and volunteers
- Hire, train and supervise staff
- Work with the media and community organizations to promote and market programs and services
- Secure and manage financial resources
- Develop and facilitate workshops and training sessions for staff and volunteers
- Develop policies and procedures
- Evaluate outcomes of programs and events
- Develop and maintain effective partnerships and sponsorships
- Write reports

Working Conditions

This position may involve weekends and evenings. Duties are performed mainly indoors. A recreation programmer works with a diverse population and will involve public relations and liaising with community agencies. Programmers work in dynamic environments, have a lot of contact with people and experience high levels of stress.

Personal Characteristics

- Possesses strong leadership skills
- Values volunteers and staff
- Excellent oral and written communication skills
- Able to relate to diverse groups
- Self-directed
- Team player
- Innovative
- High energy
- Organized and resourceful
- Works well under stress
- Able to multi-task
- Effective at time-management

Educational Requirements

- Diploma or Degree in Recreation or related discipline

Other Requirements

- Experience in programming recreation opportunities
- Supervisory experience
- Current First Aid and CPR
- May need Class 4 drivers license
- Clean criminal record check
- Proficiency with Microsoft Office programs such as word, excel, access and FrontPage

Salary

The salary for this position is between \$14 and \$26 per hour.

Recreation Programmer – Older Adults

Recreation Programmers for Older Adults are responsible for developing, implementing and evaluating programs and activities that are specifically designed to increase the quality of life for older adults populations.

Duties

- Research trends in recreation participation for older adults
- Assess needs of older adults
- Design program offerings
- Develop programs including theme, schedule, objectives, venue, leadership, evaluation etc
- Ensure leadership and supervision of staff and volunteers
- Hire, train and supervise staff
- Work with the media and community organizations to promote and market programs and services
- Secure and manage financial resources
- Develop and facilitate workshops and training sessions for staff and volunteers
- Develop policies and procedures
- Evaluate outcomes of programs and events
- Develop and maintain effective partnerships and sponsorships
- Write reports

Working Conditions

This position may involve weekends or evenings. The programmer will often accompany the group on excursions involving both indoor and outdoor activities. There may be some lifting when loading and unloading equipment on the bus or helping older adults on and off the bus.

Personal Characteristics

- Excellent oral and written communication skills
- Friendly and positive attitude
- Create and innovative in designing programs
- Encouraging and motivating to staff and volunteers
- Value honesty and integrity in dealings with others
- Organized and be detail orientated
- Excellent problem solving and multi-tasking skills
- Manage time effectively
- Comfortable speaking to groups and in public
- Self directed
- Team player

Educational Requirements

- Diploma or Degree in Recreation, Therapeutic Recreation or equivalent

Other Requirements

- Class 4 Driving License may be required
- Current Standard First Aid and CPR
- Clean criminal record check may be required
- Fitness Coach certification may be required
- Experience working with older adults
- Familiarity with computer programs such as Excel, Access, and Word

Salary

This position pays between \$14 and \$26 an hour.

Recreation Director

A Recreation Director is responsible for the effective development, operation and maintenance of recreational, sport, culture, heritage and park facilities. This person oversees a variety of community programs and services relating to recreation and health. He/she acts as a community liaison and may work with regional boards to develop support services or market community programs within the region.

Duties

- Develop strategic planning documents for the organization
- Determine organizational structure under direction from supervisory group (Board, Commission)
- Assemble and lead a team of staff
- Liaison with community organizations
- Represent the recreation organization to the public
- Oversee the use of volunteer programs
- Report to the Recreation Commission
- Manage general administrative functions of the Recreation Commission
- Manage recreation and sport facilities and/or parks
- Develop and maintain partnerships
- Secure and manage financial resources
- Research and write grant proposals
- Provide facilitative/strategic and administrative support to the Community Advisory Board
- Evaluate organization effectiveness, staff, program offerings, and facility operations

Working Conditions

This position may require some travel, weekend or evening work. A Recreation Director works indoors in administrative/managerial roles often in a high profile environment. Recreation Directors work in a dynamic, high-pressure position where daily decision-making is the norm.

Personal Characteristics

- Excellent organizational skills
- Excellent oral and written communication skills
- Self-motivated
- Energetic and enthusiastic
- Relate well to diverse populations and work well with others
- Comfortable speaking in front of large groups
- Work well with a Board of Directors and Recreation Commission
- Detail oriented
- Effective time management skills
- Strategic thinking skills
- Excellent human resource management skills

Educational Requirements

- Degree in Recreation, Social Work or an equivalent discipline

Other Requirements

- Excellent computer skills
- Society of Local Government Managers (<http://www.clgm.net/>) offers certification and education opportunities that enhance professional practice and employability.

Salary

Depending on the location, size and type of organization, this position pays between \$50,000 and \$85,000 annually.

Recreation Activity Leader

A Recreation Activity Leader works with diverse populations in designing and delivering recreation programs and activities. Activity leaders work directly with participants in recreation programs to facilitate satisfying experiences.

Duties

- Design, implement and evaluate programs/activities, jointly with a recreation programmer
- Arrange equipment and resources for activities
- Work with volunteers and staff to lead activity plans
- Lead groups in both indoor and outdoor activities
- Accompany groups on excursions
- Supervise groups of participants during free play activities
- Communicate with participants and relatives regarding activities
- Manage small program budgets
- Oversee daily routines of participants
- Manage risks associated to recreation activities
- Respond to emergencies, concerns and medical incidents
- Evaluate activities
- Report to recreation programmer

Working Conditions

Often performed Monday to Friday, this position may sometimes require weekend or evening work. Leaders work in all weathers, both indoors and outdoors, accompanying participants on excursions. Duties may require lifting of small children or equipment during excursions.

Personal Characteristics

- Energetic and enthusiastic
- Responsible
- Able to relate well to children and youth
- Team player
- Self-motivated
- Able to multi-task during stressful situations
- Sound judgment
- Good organizational skills
- Comfortable in a fast-paced environment

Educational Requirements

- May require a Recreational Diploma or Degree
- If working with young children may require an Early Childhood Education certificate

Other Requirements

- These will depend on position applied for
- Experience working with children
- Current Standard First Aid and CPR
- Class 4 License may be preferred

Salary

This position pays between \$8.50 and \$18.00 an hour.

Marketing Coordinator

Marketing Coordinators in recreation are responsible for all stages of an organization's marketing strategies including promotions, public relations, web-design, and community liaison.

Duties

- Develop awareness and understanding of products and services
- Research and stay abreast of market trends, competition and customers
- Research and design potential marketing strategies
- Publication design and layout
- Coordinate communications and public relations
- Design and/or updating marketing materials
- Prepare press releases
- May require direct sales
- Represent organization at trade shows
- Complete reports and correspondence to outside organizations or clients
- Book meetings, training sessions or conferences
- Obtain marketing goals and revenue forecasts
- Manage financial resources allocated to marketing
- May require supervision of staff

Working Conditions

This position often requires travel during the week as well as during weekends or evenings. A marketing coordinator spends a large portion of his/her time liaising with media, clients or community organizations. A marketing coordinator may spend numerous hours standing or walking while at events such as trade shows.

Personal Characteristics

- Excellent organizational skills
- Excellent oral and written communication skills
- Professional and personable
- Effective team player
- Self-motivated
- Creative
- Resourceful
- Customer service orientated
- Flexible and able to meet deadlines
- Good judgment and ability to respond quickly
- Discreet, honest and reliable
- Able to deal with change in a fast-paced environment

Educational Requirements

- Diploma or Degree in Recreation, Business Management, Special Event Management or equivalent discipline with coursework in marketing and promotions management

Other Requirements

- Valid drivers license
- Able to travel extensively
- Excellent computer skills with all Microsoft Office programs
- Knowledge of additional programs such as graphic software, desktop publishing software and macro media software may be required or preferred
- Experience with webmaster or web site design

Salary

This position pays between \$35,000 and \$55,000 annually. It may include benefits and travel expenses.

Lifeguard

A Lifeguard is responsible for the general safety of pool users and the general cleanliness of the facility. They may be responsible for staff supervision or the implementation of aquatic programs.

Duties

- Provides constant safety supervision
- Maintain controlled aquatic environment
- Instructs a wide variety of aquatic programs
- May organize and participate in special events
- Complete various documents and reports
- May assist with the operation of the filter room and balancing of water chemistry
- Assists in the daily cleanliness of the facility
- May supervise staff

Responsible for First Aid Duties and emergencies

Working Conditions

A lifeguard works a variety of shifts including weekends and evenings. They operate under a high level of stress when supervising the safety of facility users. May be required to lift swimmers during rescue operations.

Personal Characteristics

- Detail oriented
- Excellent leadership skills
- Excellent oral and written communication skills
- Team player
- Self-directed
- Able to relate to diverse populations
- Work well under stress
- Able to multi-task while remaining alert to surroundings
- Good judgment

Educational Requirements

- Requires a variety of certifications which may include the following:
 - Grade 12
 - Water Safety Instructor Certificate
 - Red Cross Water Safety Instructor Certificate II
 - CPR-C Certificate
 - Lifesaving Society Instructor Certificate
 - National Lifeguard Service Award
 - Current First Aid

Other Requirements

- Knowledge of water chemistry, filtration and aquatic equipment
- Knowledge of First Aid, water rescue methods and public safety issues

Salary

This position pays between \$14 and \$20 an hour depending on the level of certification held.

Head Lifeguard

A head lifeguard oversees the safety of aquatic facility users, performs administrative tasks, ensures the cleanliness and maintenance of the facility, monitors chemicals and filtrations systems and oversees staff.

Duties

- Training, supervising and evaluating staff
- Teaching advanced and specialty programs
- Facility maintenance
- Prepares teaching and work schedules

Administration Duties

- Monitors enrolment in aquatic programs
- Maintain water chemical levels and monitor water filtration systems
- Prevent or respond to mechanical or operational problems
- Oversee compliance with applicable safety and health regulations
- Liaison with facility operator, community groups and volunteers

Working Conditions

This position requires working weekends and evenings. It may require lifting during First Aid or rescue procedures.

Personal Characteristics

- Organized
- Able to work with diverse populations
- Excellent oral and written communication skills
- Enthusiastic and a positive attitude
- Work well under high stress situations
- Team player
- Self-directed
- Excellent interpersonal skills

Educational Requirements

- Requires a variety of certifications which may include the following:
- May require a diploma or degree in Aquatics, Recreation or a related discipline
- NLS
- Lifesaving Instructor
- Lifesaving Examiner
- WSI
- Basic Rescuer CPR-C
- First Aid Certificate
- Pool Operators Level II
- Red Cross IT
- NLS Instructor
- Lifesaving IT
- First Aid/CPR Instructor
- AEC Instructor/Examiner

Other Requirements

- Knowledge of water chemistry, filtration and aquatic equipment
- Knowledge of First Aid, water rescue methods and public safety issues
- 1 to 3 years experience in aquatic programs and facilities

Salary

This position pays between \$17 and \$24 an hour. May depend on levels of certification held

Heritage and Museum Coordinator

A Heritage and Museum Coordinator manages and markets the facility, developing partnerships within the community and working with facility and program boards and committees.

Duties

- Develop a strategic marketing plan for the heritage and museum
- Ensure quality heritage and museum services are offered to the community
- Market heritage resources to the community and visitors
- Develop programs, events and projects to encourage attendance
- Manage financial resources and prepare budget documents
- Develop and implement policies and procedures
- Prepare reports and documentation
- Conduct and analyze market research
- Represent organization on local and regional committees
- Fundraise and write grant proposals
- Hire, train and supervise staff
- Recruit and train volunteers
- Coordinate archival collection
- May manage retail services such as gift shops

Working Conditions

This position may require travel on the weekend or evenings to attend committee or board meetings. Most of the work is indoors.

Personal Characteristics

- Excellent interpersonal skills
- Excellent organizational skills
- Excellent oral and written communication skills
- Professional and personable
- Effective team player
- Self-motivated and resourceful
- Able to work well with diverse populations
- Flexible and able to meet deadlines
- Good judgment and quick thinking
- Able to deal with change

Educational Requirements

- Degree in Marketing, Business, Commerce, Recreation or the equivalent

Other Requirements

- May require the following skills:
- An understanding of the tourism industry
- Experience in market research and analyses
- Experience in developing market strategies
- Experience working with and facilitating volunteer groups
- Excellent computer skills with Microsoft Office programs and data entry software

Salary

This position pays between \$35,000 and \$55,000 annually.

Heritage Programmer

A Heritage Programmer plans, implements and evaluates heritage programs and activities for public, community and educational institutions.

Duties

- Research, plan, implement and evaluate programs and activities
- Assist in the development of an annual work plan
- Assist with training and supporting volunteers
- Maintenance of artifacts or displays
- Plan and implement special events
- Work within program budgets
- Preparing reports and evaluations on programs and activities

Working Conditions

This position requires weekend and evening work. It may be full or part time. Programs may be conducted inside or outside. There may be lifting involved in the maintenance and set up of displays or activities

Personal Characteristics

- Enthusiastic and positive attitude
- Customer service orientation
- Team player
- Self-motivated
- Excellent oral and written communication skills
- Able to work well with diverse populations
- Energetic
- Able to work in a fast paced environment
- Enjoy working with children and youth
- Excellent interpersonal skills
- Creative
- Excellent organizational skills

Educational Requirements

- Diploma or Degree in Recreation, Education, Cultural Resource Management or equivalent discipline

Other Requirements

- Proficiency with Microsoft Office programs
- May require prior experience working in a museum
- May require previous experience working with volunteers
- May require a clean criminal record check

Salary

Not clearly defined in job descriptions

Golf Course Manager

A Golf Course Manager is responsible for the management, and marketing of the club's activities to ensure maximum membership satisfaction and facility profit.

Duties

- Develop strategic or business plans to manage golf course facilities
- Provide leadership to staff
- Hire, train and supervise staff
- Oversee the planning and implementation of special events and activities
- Oversee the development and implementation of marketing strategies
- Oversee the maintenance of the facility and turf
- Develop and implement policies and procedures
- Report to the Board of Directors
- Professionally represent the facility with the media and during community events or functions
- Manage and prepare large fiscal budgets

Working Conditions

This position may require some travel and evening or weekend work. There may be tasks requiring the manager to be outdoors as well as indoors. Golf course manager is a high profile position in a fast paced, highly professional and often political environment.

Personal Characteristics

- Professional
- Work well under high stress situations
- Excellent interpersonal skills
- Excellent organizational skills
- Excellent oral and written communication skills
- Professional and personable
- Effective leadership skills
- Self-motivated
- Customer service oriented
- Entrepreneurial
- Flexible and able to meet deadlines
- Good judgment and ability to respond quickly to situations

Educational Requirements

- Degree in Recreation, Business, Marketing or equivalent discipline with emphasis on management skills such as human resource management, financial management, marketing and strategic planning.

Other Requirements

- Previous experience in golf course management
- May require Turf grass management diploma
- Knowledge of automated irrigation systems preferred
- Excellent computer skills
- May require Class A membership in the Canadian Golf Superintendents Association
- Excellent understanding of golf
- Recreation Facility Personnel Courses (see <http://www.aarfp.com>) can be required and vary depending on the type of facility.
- Workplace Hazardous Materials Information System (WHIMIS) certification

Salary

Rate of pay is not clearly defined.

Director of Community Services

A Director of Community Services is responsible for the development of comprehensive community services programs including use of park areas and administering recreation facilities.

Duties

- Develop strategic community planning initiatives
- Integrate a range of community services within an organizational structure
- Develop presentations and report to Council, Family and Community Support Services Board and the Parks, Recreation and Culture Board
- Interact effectively with Municipal Council, senior staff, employees and the public
- Oversee the development of training workshops/seminars
- Research and write grant proposals
- Participate in social and economic development initiatives
- Represent the organization to the public
- Facilitate public consultation processes
- Manage a large fiscal budget
- Undertake comprehensive evaluation strategies for community services

Working Conditions

This position may involve travel as well as weekend and evening work. The diverse Duties involve both indoor and outdoor environments. Community Services Director is a high profile position that may require exposure to the public and to political issues.

Personal Characteristics

- Professional and personable
- Work well under high stress situations
- Excellent interpersonal skills
- Excellent organizational skills
- Excellent oral and written communication skills
- Excellent leadership skills
- Self-motivated
- Responsive
- Politically sensitive
- Sound judgment
- Ability to respond to issues, concerns and situations
- Able to deal with change

Educational Requirements

- Degree in Recreation Management, Business, Social Services or related discipline with coursework in management areas such as human resource management, public relations, strategic planning, financial management and marketing.

Other Requirements

- 2 to 3 years experience working in a Municipal senior management level
- Society of Local Government Managers (<http://www.clgm.net/>) offers certification and education opportunities that enhance professional practice and employability.

Salary

Salaries vary depending on the size, location and type of community but range between \$40,000 to \$80,000 annually.

Camp Coordinator

A Camp Coordinator is responsible for managing all aspects of a residential camping program.

Duties

- Market and promote the camp facilities and services
- Secure bookings from camping groups or campers
- Determine needs of camping groups
- Develop a camp schedule
- Determine equipment and staff resources for group needs
- Negotiate with camp staff to secure resources for group needs
- Hire, train and supervise camp staff
- Develop volunteer management program
- Develop and implement risk management program
- Administration tasks
- Register campers or camping groups
- Develop and manage financial budgets
- Coordinate with stakeholders such as Camp Director, property management

Working Conditions

A Camp Coordinator usually lives full time at the camp; this involves utilizing camp accommodations and meals. He/she will work in both an indoor or outdoor environment in all weather conditions. The position may involve lifting of equipment or participants during activities, First Aid or Rescue procedures.

Personal Characteristics

- Professional and personable
- Creative and innovative
- High energy
- Committed to the camp experience
- Excellent interpersonal skills
- Excellent organizational skills
- Excellent oral and written communication skills
- Effective team player
- Self-motivated
- Resourceful
- Able to work well with diverse populations
- Flexible and able to meet deadlines
- Strong judgment and ability to problem solve

Educational Requirements

- Diploma or Degree in Recreation Management

Other Requirements

- Current Standard First Aid and CPR
- Clean criminal record check
- May require class 4 drivers license
- May require Christian ministry training and specific religious affiliations if the camp is based on a specific religious ideology

Salary

Salary not clearly defined.

Youth Camp Counselor

A Youth Camp Counselor coordinates, implements and evaluates a variety of programs and activities for camp participants.

Duties

- Assess campers recreation needs, interests and abilities
- Maintain effective relationship with and among campers
- Counsel campers with personal and social situations
- Plan, implement and evaluate camp activities
- Manage program budgets
- Ensure risk management procedures are followed
- Supervise program participants
- Communicate with participant's families

May assist in marketing or administrative Duties

- Plan special events
- Assist with maintenance and cleaning of camp facility
- Maintain program equipment

Working Conditions

A Camp Counselor usually lives full time at the camp; this involves utilizing camp accommodations and meals. He/she may stay in the camp for several months at a time working weekends, evenings and holidays. This position involves working in outdoor environment in all weather conditions. It is usually a seasonal position. The position may involve lifting of equipment or participants during activities, First Aid or Rescue procedures.

Personal Characteristics

- Enthusiastic and positive
- Team player
- Creative and innovative
- Resourceful
- Strong counseling skills
- Flexible and able to adapt easily to change
- Able to work in a fast paced environment
- Enjoy working with diverse groups
- Enjoy being outdoors in all weather
- Enjoy outdoor recreational environments and activities
- Organized
- Good oral and written communication skills

Educational Requirements

- May require Recreation Diploma or Degree
- Current First Aid and CPR

Other Requirements

- May require valid class 4 drivers license
- Clean criminal record check
- May be a minimum age requirement of 18 years old

Salary

Salary can range from \$8.50 to \$18.00 per hour depending on the size, location and type of camp.

Recreational Programmer – Aboriginal Participants

An Aboriginal Recreational Programmer plans, implements and evaluates recreational programs that meet the specific needs of Aboriginal populations.

Duties

- Research, design, supervise and evaluate recreational programs
- Coordinate volunteer programs
- Hire, train and supervise staff
- Work Aboriginal families and elders to implement culturally appropriate programming
- Manage financial budgets
- Develop and facilitate workshops that encourage participants to learn about traditional ways and customs
- Develop policies and procedures
- Develop youth leadership training programs

Working Conditions

This position may involve weekends and evenings. Duties are performed both indoors and outdoors. May involve lifting of equipment during activities.

Personal Characteristics

- Possesses a collaborative leadership style
- Values volunteers and staff
- Excellent oral and written communication skills
- Respects the values, culture and language of Aboriginal people
- Self-directed
- Team player
- Innovative
- Warm, outgoing personality
- Organized
- Works well under stress
- Able to multi-task
- Effective at time-management

Educational Requirements

- Diploma or Degree in Recreation, Human Services, Child or Youth Work or related discipline
- May require Aboriginal Awareness Teachings
- Current First Aid and CPR

Other Requirements

- 1 or more years working with Aboriginal populations
- May need Class 4 drivers license
- Clean criminal record check
- Proficiency with Microsoft Office programs such as word, excel, access and FrontPage
- May need suicide prevention training
- Ability to maintain positive relationships with community elders

Salary

The Salary for this position is not well defined.

Athletic-Games Program Director

An Athletic Games Program Director is responsible for delivery of sport programs, sport leagues, youth initiatives and/or sport camps while providing support to a Board of Directors or Athletic Committees.

Duties

- Program development and delivery
- Recruit, supervise, train and evaluate staff and volunteers
- Research and analyze need assessments for members and participants
- Lead or facilitate workshops or campaigns
- Purchase and maintain program equipment
- Promotion and marketing, including brochure and poster design
- Distribution of information, schedules and equipment
- Enforce rules, regulations and safe play
- Write reports
- Liaising with coaches, referees, members, participants and community
- Fundraising
- Manage a large fiscal budget
- Develop and implement policies and procedures

Working Conditions

This position requires flexibility in working weekends and evenings. Most of the Duties are performed indoors. This may include working in the cooler ice-rink environment. The job may entail hours of standing or walking during completion of certain tasks and may require travel.

Personal Characteristics

- Independent and self-directed
- Excellent oral and written communication skills
- Facilitate conflict resolutions in a calm and professional manner
- Good judgment
- Ability to assume responsibility and take initiative
- Motivating and inspiring to self and others
- Committed to continuous learning and development in self and other
- Customer service orientation
- Effective team player
- Work effectively in a fast-paced, dynamic environment
- Appreciate and value diversity
- Creative and innovative

Educational Requirements

- Degree in Recreation, Physical Education, Business Administration or equivalent in a related discipline
- First Aid Certification
- May require coaching certification

Other Requirements

- Thorough knowledge of sport rules, regulations and safe play practices
- Proficiency with Microsoft office programs
- Experience in marketing and promotions
- Significant management and business experience

Salary

The Salary for this position ranges from \$30,000 to \$80,000 annually, depending on experience, education and the employer organization.

Arts and Culture Development Officer

An Arts and Culture Development Officer guides and directs the development of cultural facilities, services and initiatives within a community.

Duties

- Act as an ambassador of the facility with community organizations, sponsors, artists, user groups and volunteers
- Market and promote the facility and cultural services offered
- Develop and implement programs and services
- Develop and implement policies and procedures
- Developing marketing and business plans
- Coordinate cultural community initiatives

Manage all administrative Duties of facilities

- Recruit, train and supervise staff and volunteers
- Fundraising and writing grant proposals
- Manage a large fiscal budget

Working Conditions

This position may require travel on the weekend and evening to represent the facilities to a variety of public and private organizations. Duties are generally carried out in an indoor environment.

Personal Characteristics

- Excellent interpersonal skills
- Excellent organizational skills
- Excellent oral and written communication skills
- Professional and personable
- Effective team player
- Self-directed and motivated
- Strong judgment
- Able to influence change
- Detail orientated
- Energetic and enthusiastic
- Creative and innovative
- Passion for the arts

Educational Requirements

- Degree in Recreation, Business Management, Fine Arts or a related discipline

Other Requirements

- Valid drivers license
- Extensive experience in managing arts and cultural services and facilities
- Experience in public relations
- Experience working with not-for-profit Boards of Directors and Societies
- Proficiency in Microsoft Office programs and other applicable software programs

Salary

The Salary for this position ranges between \$40,000 and \$70,000 annually.

Arena Manager

An Arena Manager is responsible for all aspects of arena management including public relations, ice making and maintenance and fiscal budgets.

Duties

- Making and maintaining ice
- Performing refrigeration plant checks, maintenance and custodial work
- Liaison with public, community organizations, volunteers and arena users
- Managing a large fiscal budget
- Hiring, training and supervising of staff and volunteers
- Marketing and promotion
- Develop policies and procedures
- Fundraising and writing grant proposals
- Ensure compliance to all safety regulations

Working Conditions

This position requires weekend, evening and shift work. Public relations are a major component of the position. May require heavy lifting.

Personal Characteristics

- Work well under high stress situations
- Excellent interpersonal skills
- Excellent organizational skills
- Excellent oral and written communication skills
- Professional and personable
- Effective team player
- Self-directed
- Able to work well with diverse populations
- Good judgment and quick thinking
- Able to deal with change in a fast-paced environment
- Detail orientated
- Energetic and enthusiastic

Educational Requirements

- Diploma or Degree in Recreation, Business Management or equivalent in related discipline
- Ice Re-surfacer and Forklift Certificate
- Refrigeration Operators Certificate
- Arena Operators Level I or II preferred
- BC Provincial Boiler and Refrigeration Certificate

Other Requirements

- Valid drivers license
- Current Standard First Aid Certification
- Experience in Arena Management
- Experience operating ice equipment
- Experience with Ammonia Ice Plants preferred
- Proficiency with computer programs such as Microsoft Office
- Recreation Facility Personnel Courses (see <http://www.aarfp.com>) are usually required and vary depending on the type of facility.
- Workplace Hazardous Materials Information System (WHIMIS) certification

Salary

This position pays between \$30,000 and \$60,000 annually.

Parks Technician

Parks technicians are responsible for performing technical work related to municipal, regional and provincial park systems including drafting, landscape analysis, conducting field studies and information to the public.

Duties

- Perform drafting for parks and natural space;
- Assist in the design of open space environments;
- Working with software in the preparation of landscape construction documents,
- Conducting field studies of parks and natural areas
- Providing information to public audiences

Working Conditions

Parks technicians work in both indoor and outdoor environments. Field analysis and design work is conducted outdoors but the majority of work is conducted in an office setting. Work is conducted using computer technology and upgrading of computer skills is necessary to keep pace with technological advances. The work allows opportunities for creativity, but can also be stressful due to the pressure of deadlines and political climate.

Personal Characteristics

- Excellent creative thinking skills
- Ability to solve complex problems
- Ability to incorporate different perspectives into their work
- Flexible and responsive to changing work environments
- Strong communication and presentation skills
- Strong research skills

Educational Requirements

- Diploma or degree with courses in drafting, environmental science or resource management and landscape design

Other Requirements

- Related experience
- Computer literacy in AutoCAD, MS Excel, GIS basic concepts
- Recreation Facility Personnel Courses (see <http://www.aarfp.com>) are usually required and vary depending on the type of park.
- Workplace Hazardous Materials Information System (WHIMIS) certification

Salary

\$35,000 to \$45,000 annually.

Park Planner

Parks planners are responsible for planning and designing parks and open spaces at the municipal, regional or provincial level. Accountable for planning, management, interpretation, public consultation and partnership building for parks and protected areas.

Duties

- Conducting research to inform planning decisions
- Gather and assess data and statistics
- Preparation of terms of reference for projects
- Evaluate land use proposals and requests
- Supervising project consultants and staff
- Presentations to multiple audiences
- Public consultation
- Preparation of reports
- Coordinating information and communication between stakeholders
- Make recommendations about land use issues
- Supervise site plans and construction projects

Working Conditions

Parks planners often work within groups and committee structures to make decisions. Work is conducted both in and outdoors, but indoor work dominates. Planners must make efforts to keep up to date with changes in technology. The work allows opportunities for creativity, but can also be stressful due to the pressure of deadlines and political climate.

Personal Characteristics

- Excellent creative thinking skills
- Ability to solve complex problems
- Ability to incorporate different perspectives into their work
- Flexible and responsive to changing work environments
- Strong communication and presentation skills
- Strong research skills
- Ability to work independently and within groups

Educational Requirements

- A degree in parks planning, landscape architecture, environmental sciences or a closely related discipline

Other Requirements

- Related experience
- Knowledge of planning methods/techniques

Salary

Ranges between \$40,000 and \$56,000 annually.

Campus Recreation/Intramural Coordinator

Campus recreation and intramural coordinators administer recreation and sport activities for students and faculty on College and University campuses.

Duties

- Research to determine participant needs
- Consultation with student groups
- Develop comprehensive array of recreation, sport and fitness activities for students and faculty
- Plan promotional material for programs and services
- Work with staff to develop registration procedures and facility or equipment rentals
- Develop policy and procedures for recreation facilities
- Hire, train and supervise staff and volunteers
- Plan and prepare annual budgets and authorize allocation of funds
- Order equipment and supplies
- Attend off campus events and professional association functions
- Evaluate programs, events and facilities
- Prepare annual reports

Working Conditions

Campus environments usually work on a semester basis meaning that a lot of work is done in before students begin studies in the fall and winter. Events often take place in evenings or on weekends. Work is done independently and within groups.

Personal Characteristics

- Willing to work flexible hours
- Customer service skills
- Ability to work with diverse cultures
- Ability to problem solve
- Excellent creative thinking skills
- Strong communication and presentation skills
- Strong research skills
- Ability to work independently and within groups

Educational Requirements

- Bachelor or Masters degree in Recreation Management or Physical Education

Other Requirements

- Experience with special event coordination

Salary

Between \$35,000 and \$50,000 annually.

Aquatics Programmer

Aquatics programmers design and deliver recreation and sport programs within aquatic facilities including swim classes, special events and group programs.

Duties

- Assess needs of users of aquatic environments
- Design aquatic classes and programs
- Promote and communicate program offerings to aquatic users
- Assemble resources to implement programs
- Establish registration systems and monitor program registrations
- Control financial records and budgets for programs and events
- Order and control inventory for programs and events
- Evaluate programs and events
- Ensure safety of aquatic users
- Develop partnership and sponsorship opportunities

Working Conditions

Aquatics programmers work in a people oriented environment and therefore require strong interpersonal skills. Programming requires creative thinking and problem solving skills, which can create stress and burnout.

Personal Characteristics

- Able to take initiative
- Strong interpersonal skills
- Safety conscious
- Excellent administrative and organizational skills
- Customer service skills
- Creative and resourceful
- Able to problem solve and use sound judgment

Educational Requirements

- University or College diploma or degree in recreation or physical education with an emphasis on program development and implementation.

Other Requirements

- There are numerous certifications in the aquatics sector, some that may be requested include: Bronze Cross, Red Cross Instructor Certification, CPR, National Lifesaving Society Conductor Certification, Aquatic Emergency Care Certificate, First Aid (see the Lifesaving Society website for more details at: <http://www.lifesaving.org/courses/schedule.htm>)
- Recreation Facility Personnel Licensed Pool Operator Certificate, Level I
- Strong computer skills and experience with Registration programs

Salary

The Salary may be variable depending on the size and location of the aquatic facility. For a full time aquatic programmer, the Salary range is between \$40,000 - \$55,000 annually.

Aquatics Supervisor/Director/Manager

Aquatics Supervisors or Directors are responsible for ensuring the management of programs, classes and events within aquatic facilities.

Duties

- Provide leadership
- Recruit, hire, orient and supervise aquatic staff
- Facilitate staff scheduling
- Ensure program development and evaluation
- Control of allocated financial resources
- Administration
- Control of inventory
- Create and influence safety procedures
- Public relations and education
- Develop and promote the aquatic facility

Working Conditions

Aquatics programmers work in a people oriented environment and therefore require strong interpersonal skills. Work is usually done in aquatic and office environments.

Personal Characteristics

- Leadership skills
- Team player
- Motivates others
- Strong management skills
- Effective communication skills
- Administration and organizational skills
- Ability to work on committees
- Strong interpersonal skills
- Safety conscious
- Values customer service
- Is capable of problem solving and creative thinking

Educational Requirements

- University or College degree in recreation or physical education with an emphasis on administration and management training.

Other Requirements

- There are numerous certifications in the aquatics sector, some that may be requested include: Bronze Cross, Red Cross Instructor Certification CPR, National Lifesaving Society Conductor Certification, Aquatic Emergency Care Certificate, First Aid (see the Lifesaving Society website for more details at: <http://www.lifesaving.org/courses/schedule.htm>)
- Recreation Facility Personnel Licensed Pool Operator Certificate, Level II or III

Salary

Salary grids not available in job postings.

Volunteer Coordinator

Volunteer coordinators are responsible for locating and recruiting volunteers for programs and events in the recreation industry.

Duties

- Development of volunteer management program
- Development of policies and procedures for volunteer management
- Education of staff on the needs of volunteers and process for volunteer management
- Development of volunteer positions
- Recruitment of volunteers for positions
- Screen and match volunteers to positions
- Training and orientation of volunteers
- Volunteer supervision
- Recognize volunteer efforts

Working Conditions

Volunteer coordinators usually work in office environments with diverse groups of people. They often work on or with committees to develop volunteer management programs.

Personal Characteristics

- Value volunteerism
- Supportive of personal and professional development
- Strong interpersonal, communication and leadership skills
- Resourceful
- Collaborative

Educational Requirements

- A degree in recreation administration, social sciences or related field

Other Requirements

- Experience as a volunteer

Salary

- Salary range will vary depending on size and type of organization, however full time volunteer coordinators can earn between \$28,000 to \$45,000 per year.

Recreation Facility Manager

There are numerous types of recreation facilities such as pools, arenas, parks and open spaces, leisure centers, etc. Recreation facility managers are responsible for the overall management, direction, coordination and supervision of facility operations. They are also responsible for ensuring specific performance measures are achieved, participation is maximized and facility use is optimized through operation of the facility.

Duties

- Overall management, direction, coordination and supervision of facility operations
- Achievement of performance measures
- Optimize facility usage
- Facilitate decision making among staff
- Developing policy and planning documents
- Allocation and control of resources
- Obtain research to support decision making
- Design and planning of recreation facilities
- Management of user experiences within recreation facilities
- Evaluation and report writing
- Presentations to public, decision-makers and other stakeholders

Working Conditions

Recreation facility managers work in dynamic, high profile environments. This requires individuals who are capable of problem solving, good judgment and decision-making. Facility issues can be stress inducing and political in nature.

Personal Characteristics

- Knowledge of facility management
- Business skills
- Customer service skills
- Value research for decision-making
- Understands market driven approach
- Leadership and team building skills

Educational Requirements

- Degree in Recreation Administration, Business Administration or Facility Management

Other Requirements

- Experience working in dynamic, high profile environments
- 3-5 years experience
- Recreation Facility Personnel Courses (see <http://www.aarfp.com>) are usually required and vary depending on the type of facility.
- Workplace Hazardous Materials Information System (WHIMIS) certification

Salary

Variable depending on the type, size and location of the facility. Recreation facility managers can earn between \$45,000 to \$75,000 per year.

Recreation Therapist

Therapeutic Recreation provides recreation services and leisure experiences to help people with physical, cognitive, social or emotional limitations. Recreation therapists assess individual's leisure needs and then plan, implement and evaluate outcomes. Services are offered in clinical, residential and community based settings.

Duties

- Assessment of clinical recreation needs of patients
- Development of programs and interventions
- Program development
- Program delivery and implementation
- Monitoring and evaluation of program effects and patient progress
- Coordination of volunteers and staff on recreation programs and events
- Professional development

Working Conditions

Pre-employment medical clearance and TB testing are usually required. Many settings require a criminal record check and security clearance. Some settings use pets in therapy and second-hand smoke can be encountered. Some evening and weekend work is required.

Personal Characteristics

- Ability to work with people with varying abilities
- Value the potential of recreation in enhancing quality of life
- Able to observe confidentiality of information
- Able to demonstrate professionalism
- Values continued learning and professional development
- Determined to measure the outcomes of programming
- Ability to work well with others
- Able to document, communicate and organize records

Educational Requirements

- Bachelor degree in Recreation with a specialization in therapeutic recreation, occupational therapy or related field.

Other Requirements

- Alberta Therapeutic Recreation Association (ATRA) has more information on recreation therapy including job postings (see <http://www.alberta-tr.org/home.html>). Some positions may require individuals to be a registered member of ATRA.

Salary

Variable depending on the type, size and sector of the setting. A full time recreation therapist can earn between \$35,000 to \$55,000 per year.

Special Events Coordinator

Special events coordinators are responsible for planning, developing and implementing a range of special events. Special events coordinators work in the government sector, with not-for-profit organizations and with private businesses.

Duties

- Establish and maintain effective working relationships with a variety of internal and external contacts
- Solicit funding for events from corporate sponsors and prepare proposals for grant funding
- Identify and develop events utilizing a variety of resources, partnerships and sponsors
- Negotiate and coordinate human resources for events
- Negotiate the type and costs of services to be provided, within a budget
- Organize the venue and make sure that it is appropriately set up, with regard to seating and decor
- Consult with service providers such as caterers and transport
- Prepare and deliver promotional campaigns
- Monitor budgets
- Follow up with the client to arrange payment and, after the event, to evaluate the service provided
- Collect and analyze data associated with projects undertaken, and report on project outcomes and prepare event evaluation reports
- Find solutions to problems concerning services or programs provided, or the people affected
- Review and develop administrative systems and procedures
- Oversee work by contractors and report on variations to work orders.

Working Conditions

Special event coordinators work in a dynamic, high-pressure environment. Creative thinking and problem solving skills are essential on a daily basis. Stress can produce burnout. Evening and weekend work is usually required.

Personal Characteristics

- Strong team player
- Leadership skills
- Self motivated
- Able to make decisions
- Strong creativity and artistic ability
- High energy
- Highly organized

Educational Requirements

- Diploma or degree in Recreation Administration or Business Administration with an emphasis on event management.

Other Requirements

- Special event coordinators can become a Certified Special Event Coordinator (see <http://www.cses.ca/certification.htm>)
- Strong computer literacy
- Experience developing and executing special events
- Strong written and verbal communication skills

Salary

Variable depending on the size and type of organization the special event coordinator is working within. Full time special event coordinators can earn \$35,000 to \$80,000 per year.

Fitness Instructor

Fitness instructors are responsible for designing and leading a range of fitness experiences for individuals in public, private and not for profit settings.

Duties

- Determine the fitness levels of participants
- Design fitness sessions to meet the needs of participants
- Lead fitness sessions
- Advise participants with fitness related questions
- Research fitness information
- Educate participants on general fitness issues
- Evaluate participant progress with fitness goals
- Assemble fitness environment and materials for classes
- Obtain and use fitness equipment in classes
- Choreograph fitness routines and lesson plans

Working Conditions

Fitness instructors work in an active environment and must be physically fit to lead classes. They interact with a number of individuals and must be comfortable leading people.

Personal Characteristics

- Leadership skills
- Self motivated
- Strong creativity and artistic ability
- High energy
- Highly organized
- Able to interact with diverse populations
- Resourceful
- Helpful
- Physically fit

Educational Requirements

- No formal education requirements are required, however coursework in fitness, physiology, kinetics, and leadership may assist entry to the field.

Other Requirements

- The Alberta Fitness Leadership Certification Association (<http://www.provincialfitnessunit.ca/aflca.php>) hosts numerous certification opportunities including: Fitness Theory, Group Exercise, Resistance Training, Aquatic fitness, Fitness for Older Adults and special interest courses.
- Current CPR certification
- Current First Aid certification
- The Canadian Fitness Education Services (<http://www.canadianfitness.net/fithspc.html>) offer courses in Fitness Knowledge, Weight Training, and Group Exercise.
- In order to train fitness leaders, employers may want individuals to have a Professional Fitness and Lifestyle Consultant Course Conductor Certification.

Salary

Variable depending on the size and type of organization however, fitness instructors make between \$10.00 - \$30.00 per fitness session.

College or University Professor/Instructor

Instructors and professors in recreation education programs are responsible for planning and delivering recreation courses in Colleges and Universities in both the public and private sector. At the University level, Professors are also required to undertake research activity.

Duties

- Design courses in a variety of recreation topics
- Assemble learning resources for students
- Develop class lessons plans
- Deliver classes to students
- Assist students with learning
- Develop assessment strategies
- Evaluate student progress
- Participate in Department operations
- Undertake research
- Contribute to discipline development
- Contribute to community and regional recreation

Working Conditions

Instructors and professors work mostly indoors, however those teaching outdoor recreation may work in a variety of environments. Work is primarily independent, requiring individuals to be self-directed. The position requires interaction with numerous people and a lot of public speaking.

Personal Characteristics

- Self motivated
- Task oriented
- Creative
- Confident
- Strong public speaking skills
- Interest in learning
- Ability to assist others
- Inquisitive

Educational Requirements

- Minimum education requirements are a Masters Degree in Recreation or a related area, however the majority of institutions will seek individuals with a Ph.D. in Recreation or a related area.

Other Requirements

- Teaching experience
- Active involvement in research
- Record of community contributions and scholarly publications

Salary

Variable depending on the size and type of organization. Instructors make approximately \$35,000 - \$70,000, Professors make approximately \$50,000 - \$80,000.

The sources of job postings used in developing these occupational profiles were from:

- City of Edmonton
- City of Calgary
- CivicInfo BC
- ARPA
- BCRPA
- CharityVillage
- 2010 Winter Olympics
- Working.Canada
- Govt. of Canada -- Job Bank
- Jobry
- Monster
- Cooljobs
- go2
- Travel Alberta
- HCareers
- PERC
- Meeting Professionals International
- NRPA
- Outdoor Ed

Appendix 4

Aboriginal Demographics Household Survey



Affaires autochtones et
Développement du Nord Canada

Aboriginal Affairs and
Northern Development Canada



Affaires autochtones et
Développement du Nord Canada

Aboriginal Affairs and
Northern Development Canada



Aboriginal Demographics

From the 2011 National Household Survey

Planning, Research and Statistics Branch



Aboriginal Demographics

Overview

1) Aboriginal Peoples

Size

Age Structure

Geographic Distribution

2) Population Growth

Population Growth Rate

Components of the Demographic Explosion



Part 1.

Aboriginal Peoples : Highlights

- In 2011, the Aboriginal Population was **1,400,685** according to the 2011 National Household Survey (NHS).
- The age structure of the Aboriginal population is much younger than the rest of the Canadian population.
- There is great variation in the geographic distribution across Aboriginal groups.



Aboriginal Peoples (identity-based)

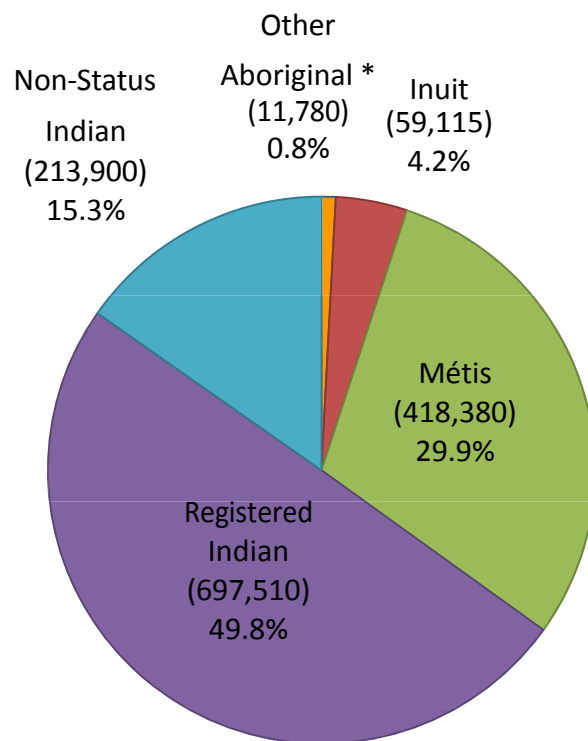
Aboriginal population was **1,400,685** in 2011, up from 1,172,790 in 2006.

Aboriginal people accounted for 4.3% of the total population of Canada enumerated in the 2011 NHS, up from 3.8% in 2006.

Statistics Canada's analysis focuses on the three main Aboriginal identity groups of First Nations, Métis and Inuit, with a distinction by registration status among the population with First Nations identity only.

AANDC uses the entire count of individuals who indicated registration status as a unique group, along with the three other non-registered groups of Non-Status Indians, Métis and Inuit.

The size of the Aboriginal population was **1,400,685** in 2011.



Note:
* *Other Aboriginal* refers to respondents who reported more than one identity group, and those who reported being a Band member with no Aboriginal identity and no Registered Indian status.

Source:
Statistics Canada, 2011 National Household Survey, AANDC tabulations.

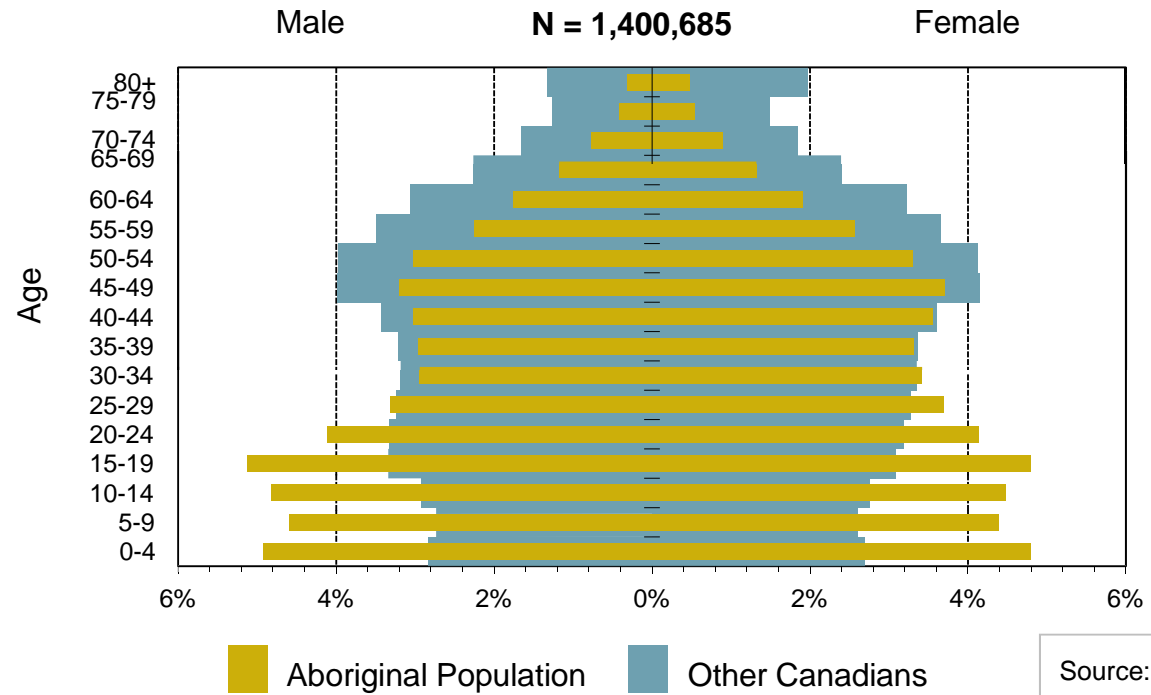


Aboriginal Peoples (identity-based)

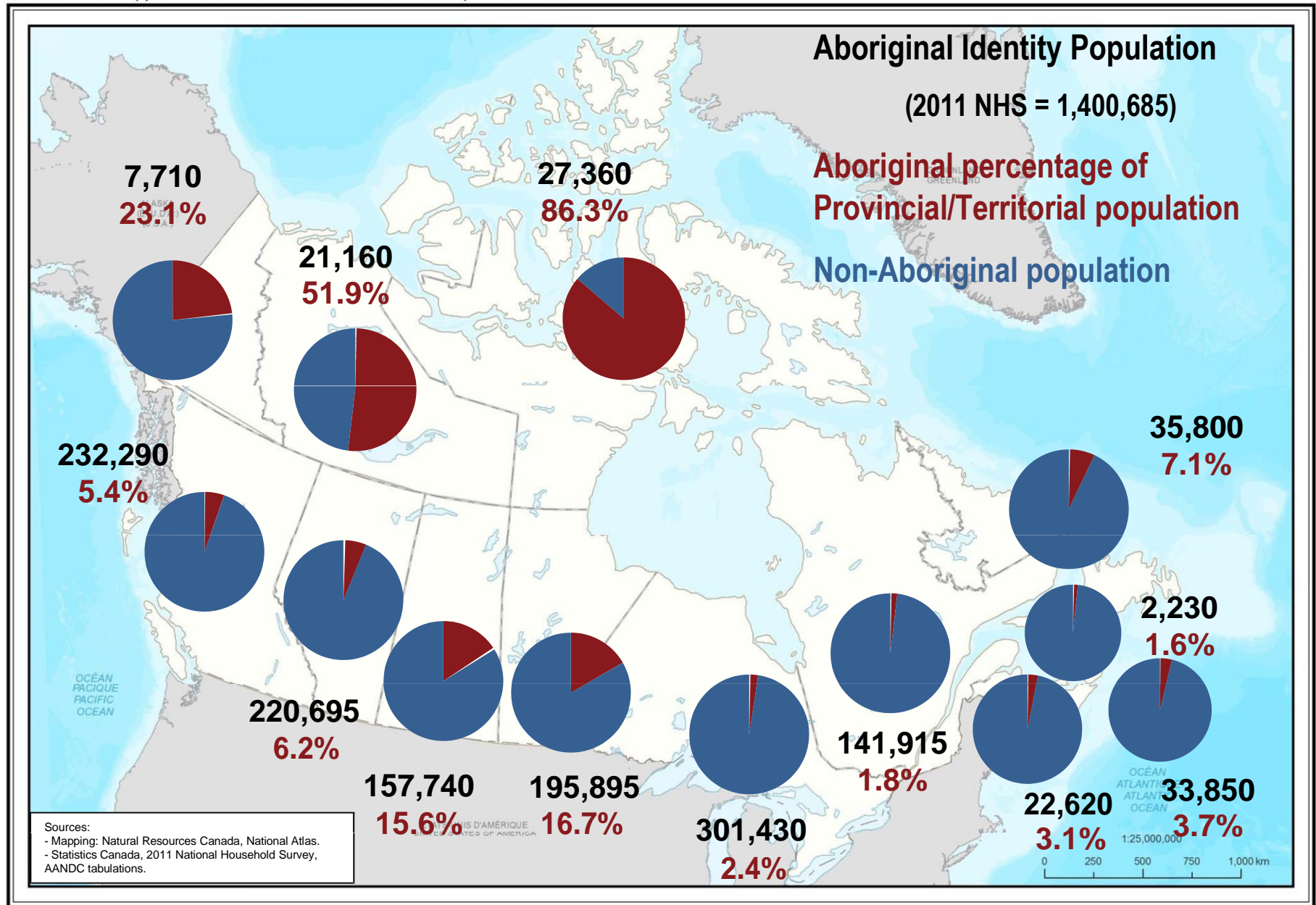
Age Pyramid of Aboriginal Population, 2011

The age structure of the Aboriginal population is much younger than the rest of the Canadian population.

Amongst the Aboriginal population, 46% of individuals are under age 25, compared to 29% for the rest of the Canadian population.



Source:
Statistics Canada,
2011 National
Household Survey,
AANDC tabulations.

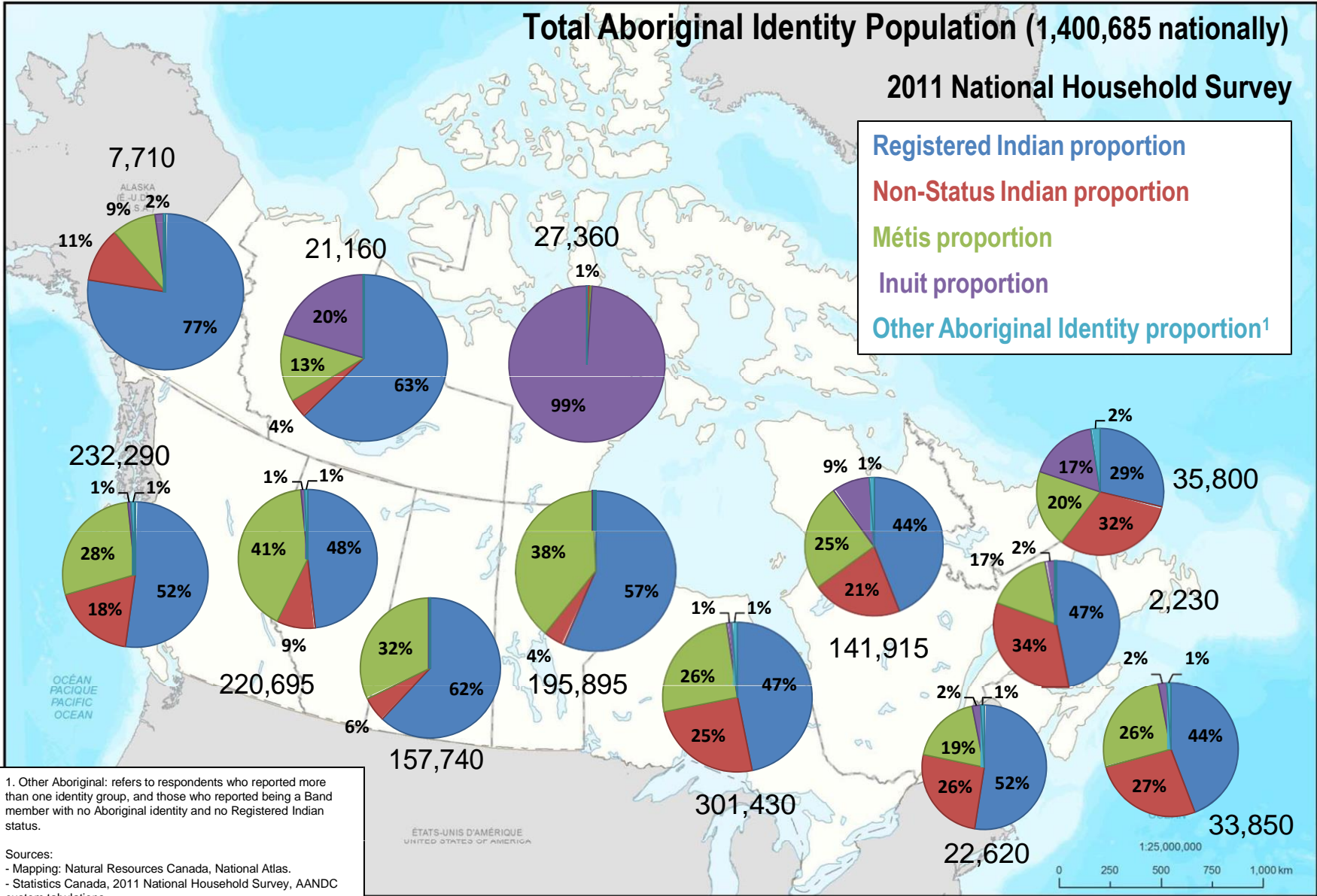




Total Aboriginal Identity Population (1,400,685 nationally)

2011 National Household Survey

Registered Indian proportion
 Non-Status Indian proportion
 Métis proportion
 Inuit proportion
 Other Aboriginal Identity proportion¹



1. Other Aboriginal: refers to respondents who reported more than one identity group, and those who reported being a Band member with no Aboriginal identity and no Registered Indian status.

Sources:
 - Mapping: Natural Resources Canada, National Atlas.
 - Statistics Canada, 2011 National Household Survey, AANDC custom tabulations.



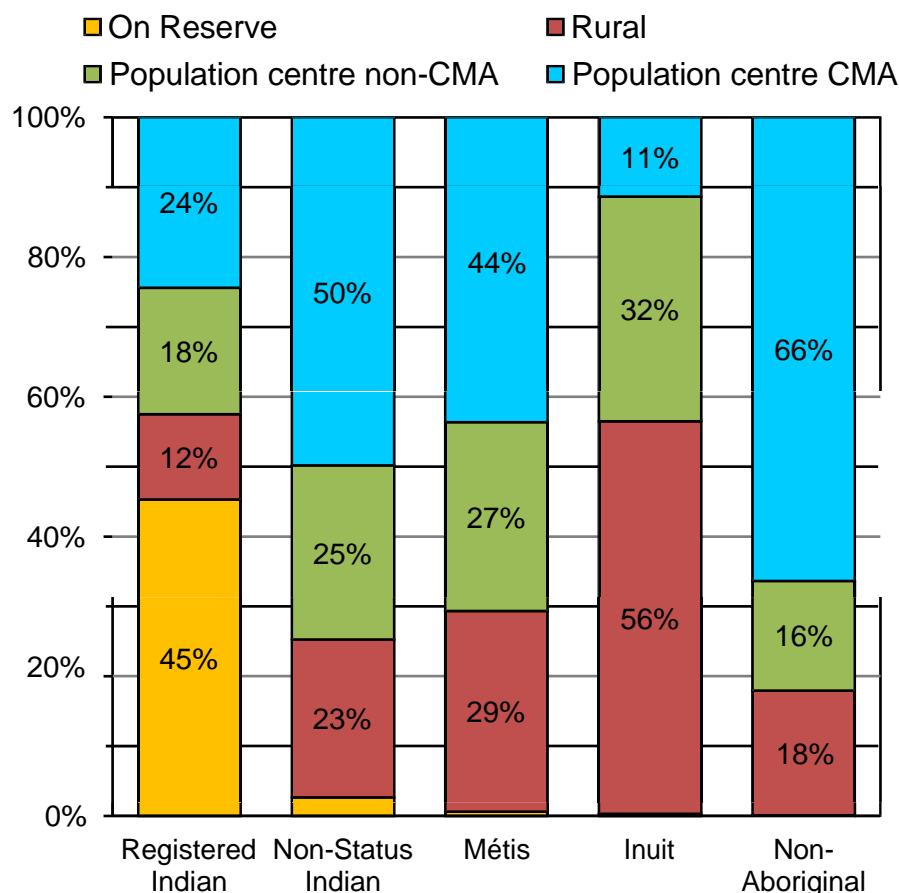
Aboriginal Peoples (identity-based) Distribution across Residency Type, 2011

Place of residence varies across groups.

About half (45%) of Registered Indians live on reserve.

The majority of Non-Status Indians (75%) and Métis (71%) live in urban areas.

Inuit live predominantly in rural areas (56%).



Population centre: Area with a population of at least 1,000 and a population density of 400 persons or more per square kilometre (replaces the term 'urban area').

Census metropolitan area (CMA): An area consisting of one or more neighbouring municipalities situated around a core. Must have a total population of at least 100,000 of which 50,000 or more live in the core.

Source: Statistics Canada, 2011 National Household Survey, AANDC tabulations.

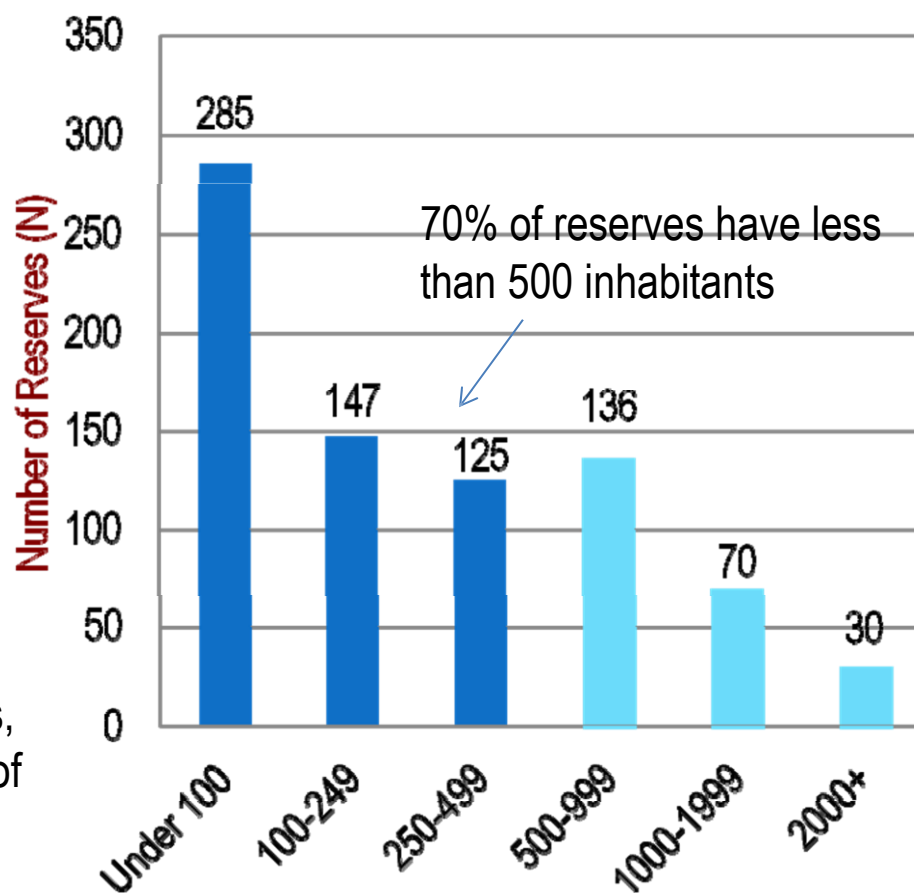


Aboriginal Peoples

First Nation Reserves by Population Size, 2011

According to the 2011 Census of Population, 70% of First Nations reserves have less than 500 inhabitants.

First Nations reserves include legally defined Indian reserves, Indian settlements, other land types created by the ratification of Self-Government Agreements, and the northern village of Sandy Bay in Saskatchewan.



Notes:

- N=793 out of a possible 997 First Nation reserves delineated by Statistics Canada in 2011. Not included are unpopulated reserves and 31 incompletely enumerated reserves for which population counts are not available.

-A major change to the "on-reserve" definition occurred in 2011. All communities in the Yukon and in the Northwest Territories with the exception of two legally defined Indian reserves were excluded.

Source: Statistics Canada, 2011 Census of Population, Geosuite.

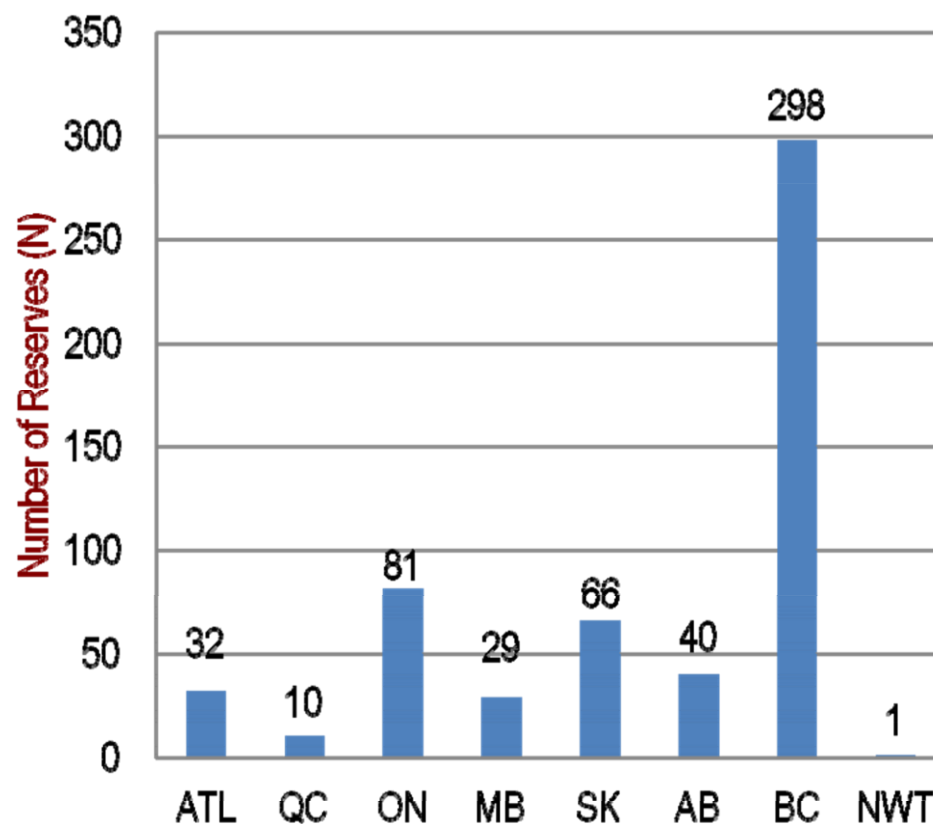


Aboriginal Peoples

First Nation Reserves with less than 500 inhabitants by Region, 2011

According to the 2011 Census, there were 557 reserves with less than 500 inhabitants.*

54% of First Nation reserves with less than 500 inhabitants are in British Columbia.



Notes:

* Not included are unpopulated reserves and 31 incompletely enumerated reserves for which population counts are not available.

-A major change to the "on-reserve" definition occurred in 2011. All communities in the Yukon and in the Northwest Territories with the exception of two legally defined Indian reserves were excluded.

Source: Statistics Canada, 2011 Census of Population, Geosuite.



Part 2.

Population Growth: Highlights

- The Aboriginal population is growing substantially faster than the rest of the Canadian population.
- There is great variation in growth rates among Aboriginal groups.
- Fertility, migration and legislative changes can explain some of the growth in the Aboriginal Population.
- However, a significant portion of the population growth is attributable to **ethnic mobility** (changes in self-reporting of cultural affiliation).



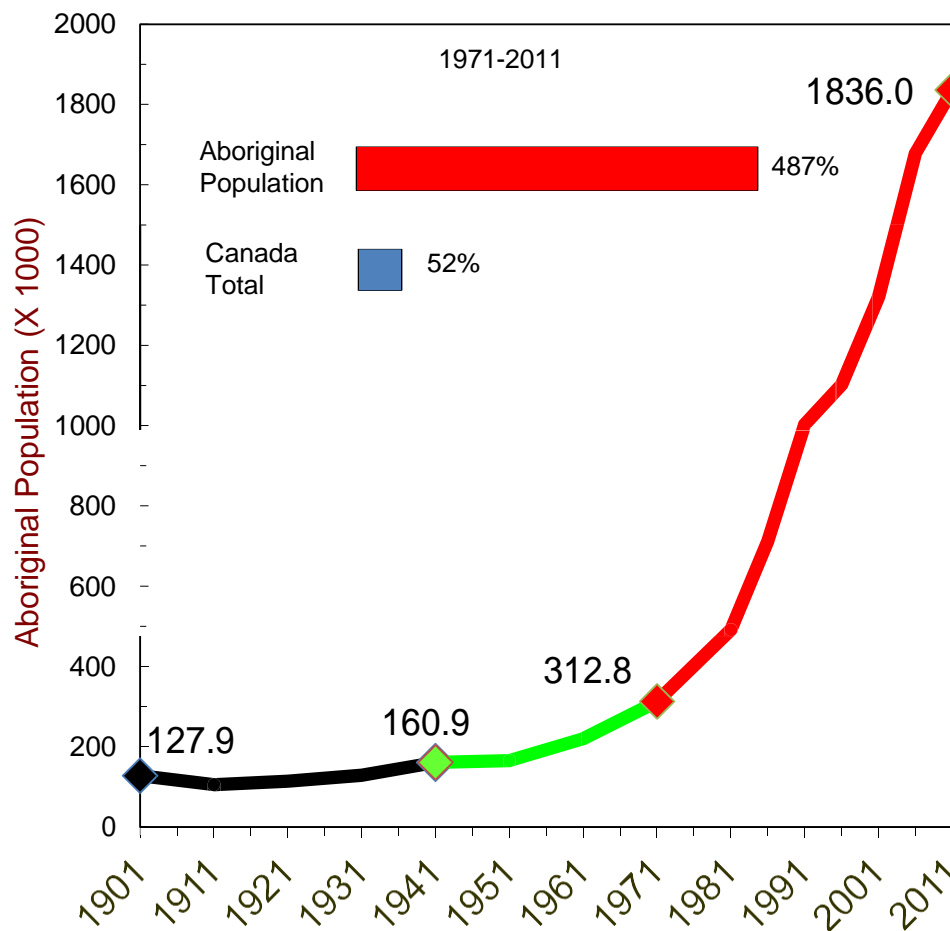
Population Growth

Aboriginal Ancestry Population, 1901-2011*

The Aboriginal ancestry population has been growing substantially faster than the Canadian population since 1971.

There were three distinct periods of population growth:

- **1901 - 1941**
Slow Growth
- **1941 - 1971**
Rapid Growth
- **1971 - 2011**
Explosion



Note:
* Only Ancestry population counts are available prior to 1996.

Sources:
Statistics Canada, 1901 to 2006
Censuses of Population and 2011
National Household Survey, AANDC tabulations.



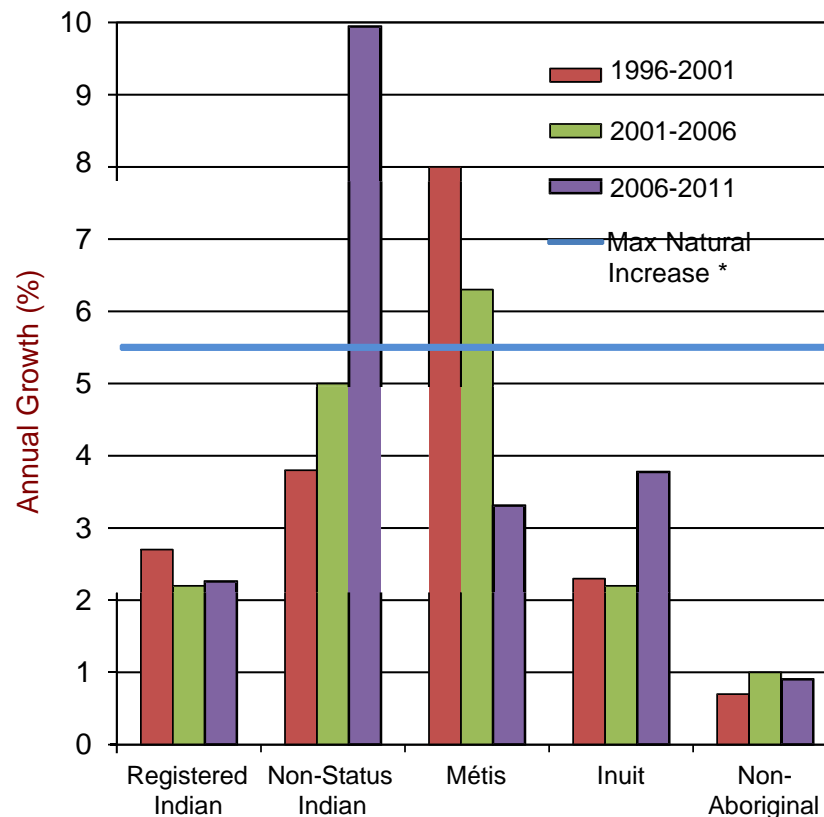
Population Growth

Annual Growth Rate of Aboriginal Groups, 1996-2011

Growth rates vary across groups.

Between 1996 and 2006, Métis population growth exceeded the theoretical maximum natural increase of 5.5% per year due in large part to an increased propensity to self-identify.

Between 2006 and 2011 the Métis annual growth dropped to 3.3% while the Non-Status Indian growth rose to almost 10%.



Note:

* This rate is obtained from the highest birth rate observable in exceptional conditions from which the lowest mortality rate is subtracted. Such a combination of high fertility and low mortality has probably never been observed (Guimond, 1999).

Sources:

Statistics Canada, 1996, 2001 and 2006 Censuses of Population, and 2011 National Household Survey, AANDC tabulations.



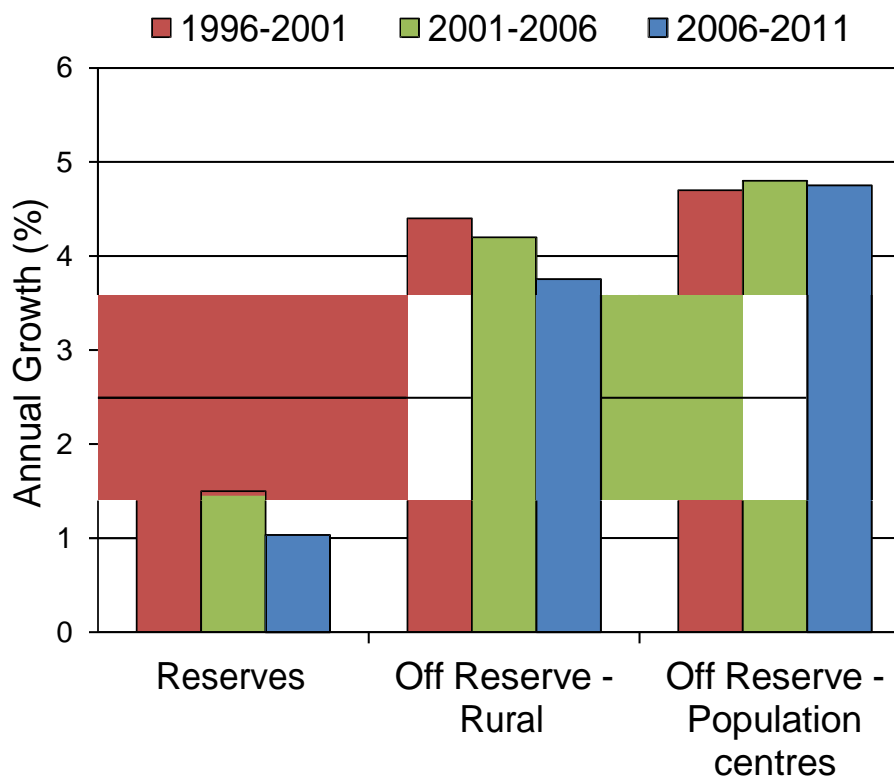
Population Growth

Annual Growth Rate of Aboriginal Population by Residency Type, 1996-2011

Growth varies by place of residence.

Nationally, the growth of the total Aboriginal population between 1996 and 2011 was more rapid off Indian reserves.

However the annual growth rate on reserve between 2006 and 2011 was slightly higher than the rate of the non-Aboriginal population off reserve .



Note:
A major change to the “on-reserve” definition occurred in 2011. All communities in the Yukon and in the Northwest Territories with the exception of two legally defined Indian reserves were excluded.

Sources:
Statistics Canada, 1996, 2001 and 2006 Censuses of Population, and 2011 National Household Survey, AANDC tabulations.

Appendix 5

Indigenous Sport and Recreation Certificate Focus Group – Executive Summary

Indigenous Sport and Recreation Certificate Focus Group – Executive Summary

A focus group was conducted in May, 2015. Participants were given a presentation outlining several areas for discussion around the development of the Post Baccalaureate Certificate in Indigenous Sport and Recreation. The areas discussed were: Program Descriptions, Cost, Timelines of program, marketing and advertising and general feedback. The following are the main points that came up in discussion.

Program Description:

- There is a sense that recent grads of PER and/or NS would be interested in this type of program; nice for students to have a graduate level option in this area
- Might be nice to add a practical component; consensus for hands on learning and practical application even though the primary target audience is full time recreation practitioners
- Potential to move the one week intensive to the beginning of program so students can get to know each and network from the start, suggestion only depending on what's involved in the one week and the role of the conference
- There was a strong sense to grow this area and a general excitement regarding the program
- This could be a great bridging program from undergrad to grad to work with a practical component
- Online is good, great that students do not have to relocate and it's open to anyone regardless of location or proximity to campus
- Might be a struggle for students that are full time employees that have been out of school for 10, 15, 20 years to start learning all over again; perhaps an opportunity for a non-credit bridging program for those coming back from the workforce
- Flexibility will be key especially those traveling from further distances like the North

Cost:

- Views on both whether too high or too low
- From an academic perspective, might want to consider increasing it
- From a Recreation Practitioner perspective, might want to consider lowering it
- Perhaps that's a sign we're right in the middle and that's the perfect place to be?
- Scholarships and bursaries may be available (Carl Amrind)?
- Typically, employers do have a budget for PD funding however some may or not qualify for it and others may receive it in the form of time off to take the courses

Timelines:

- Condensed courses are appealing for those working full time as long as students are clear ahead of time what is expected of them
- Could be scary, might want to lay it out longer
- Support for condensed courses, especially those working full time

Marketing:

- Something short, concise and punchy so that people are interested enough from it and then direct them to a website for more information
- Ensure website is up to date and accurate
- Post card size at best
- Social media great ways to get younger demographic
- Tag onto mail outs with ARPA, other non-profit partners
- Ensure to be connected with schools and other faculties around campus
- Students might want to know about it early on and then have a few years to think about it before committing to it and then they are more likely to register
- Perhaps gain access to specific recreation/indigenous magazines and post a blurb in it with a link to website for more details
- Aboriginal recruitment officers and faculty offices
- North American Indigenous Games
- Attend conferences
- Link to website on other partnering websites (i.e. ARPA)

Other:

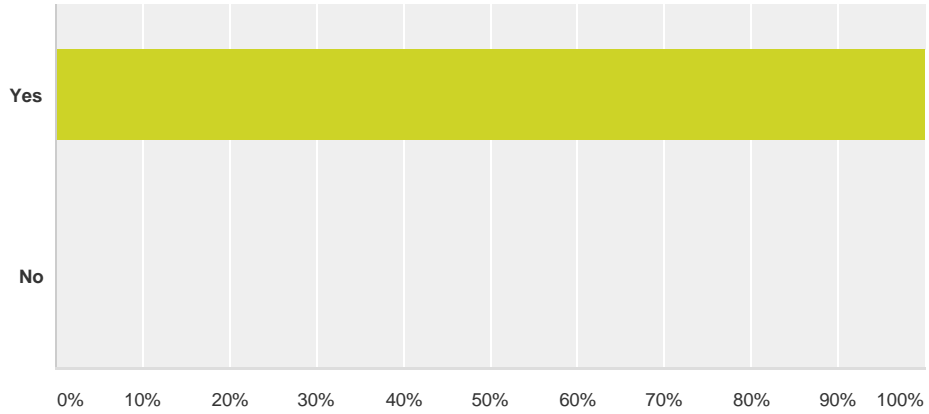
- Make it broad enough to encompass a larger target audience as there is a need
- Practical component will be beneficial
- Think about other areas such as health promotion, physical literacy, municipality, schools and youth and recreation & leisure

Appendix 6

Indigenous Sport and Recreation Certificate Focus Group – Survey Data

Q1 Have you ever been interested in going back to post-secondary to further your education or gain some professional development?

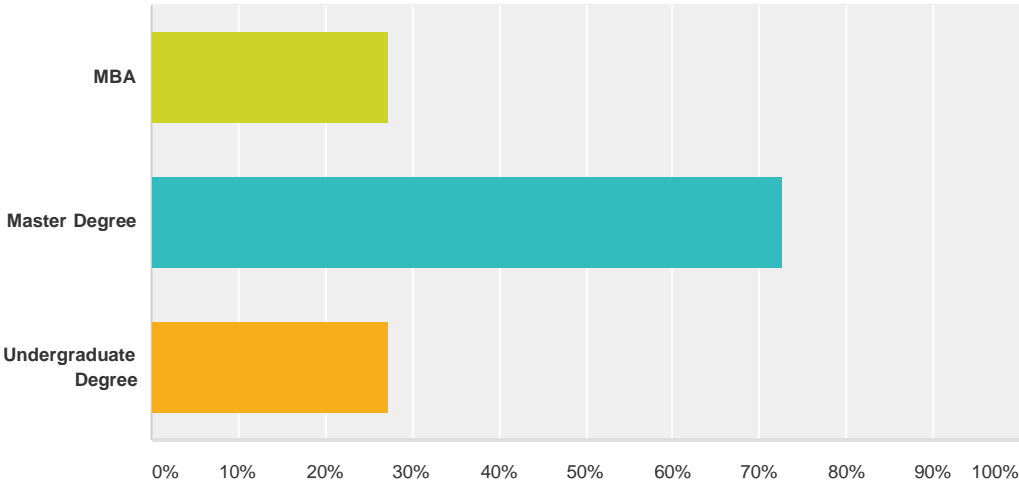
Answered: 23 Skipped: 0



Answer Choices	Responses
Yes	100.00% 23
No	0.00% 0
Total	23

Q2 What types of courses have you thought about taking?

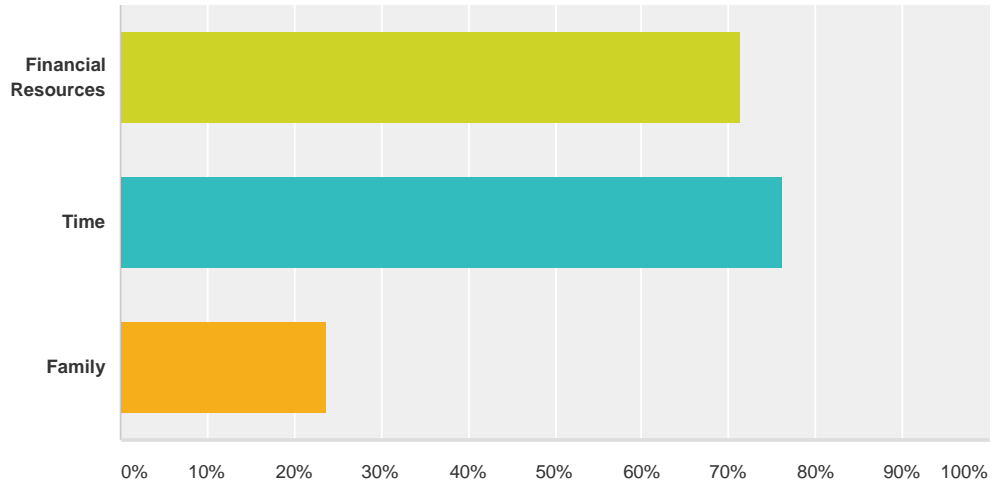
Answered: 22 Skipped: 1



Answer Choices	Responses
MBA	27.27% 6
Master Degree	72.73% 16
Undergraduate Degree	27.27% 6
Total Respondents: 22	

Q3 What has deterred your so far?

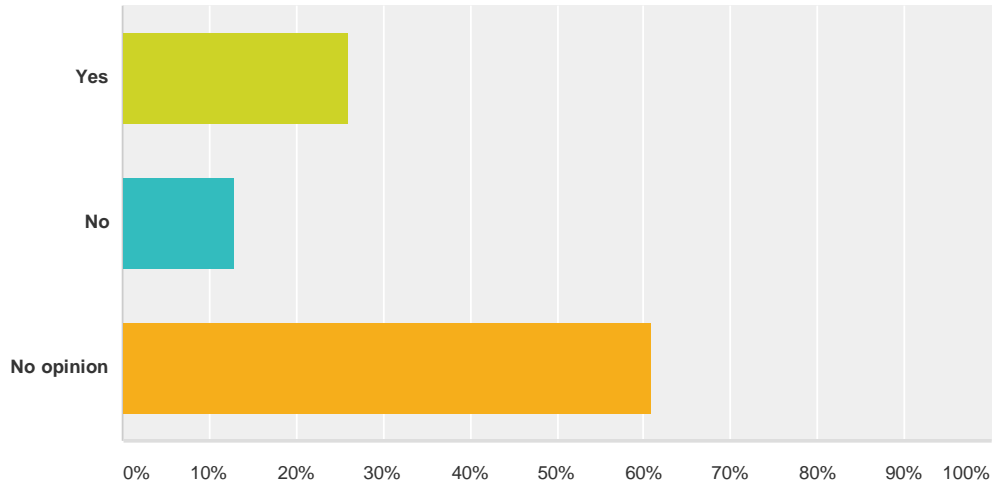
Answered: 21 Skipped: 2



Answer Choices	Responses
Financial Resources	71.43% 15
Time	76.19% 16
Family	23.81% 5
Total Respondents: 21	

Q4 Would you prefer to see a program start in January compared to the traditional September start date?

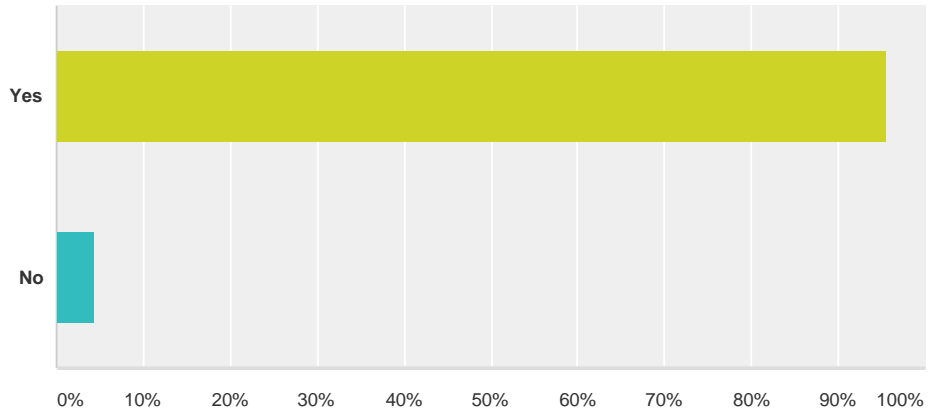
Answered: 23 Skipped: 0



Answer Choices	Responses
Yes	26.09% 6
No	13.04% 3
No opinion	60.87% 14
Total	23

Q5 Would shorter, more condensed courses be more appealing to you as a full time employee?

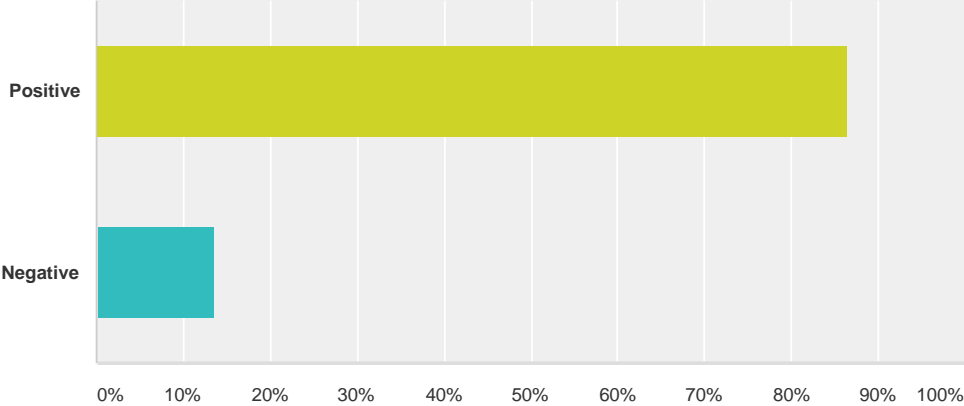
Answered: 23 Skipped: 0



Answer Choices	Responses
Yes	95.65% 22
No	4.35% 1
Total	23

Q6 Would having a one-week, mandatory component be a positive or negative feature?

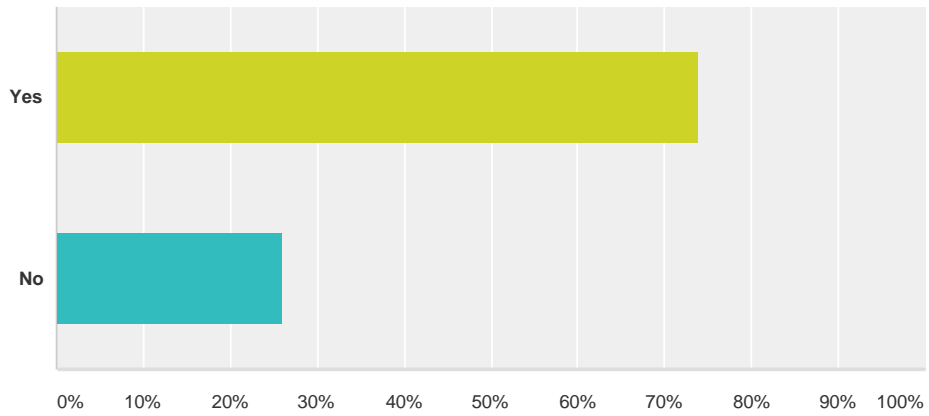
Answered: 22 Skipped: 1



Answer Choices	Responses	
Positive	86.36%	19
Negative	13.64%	3
Total		22

Q7 Based on the program description, is this a program that would interest you?

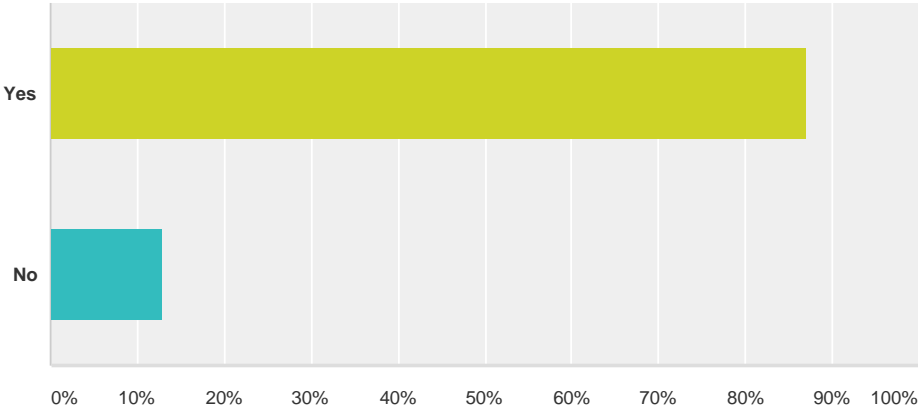
Answered: 23 Skipped: 0



Answer Choices	Responses	
Yes	73.91%	17
No	26.09%	6
Total		23

Q8 Does online learning appeal to you?

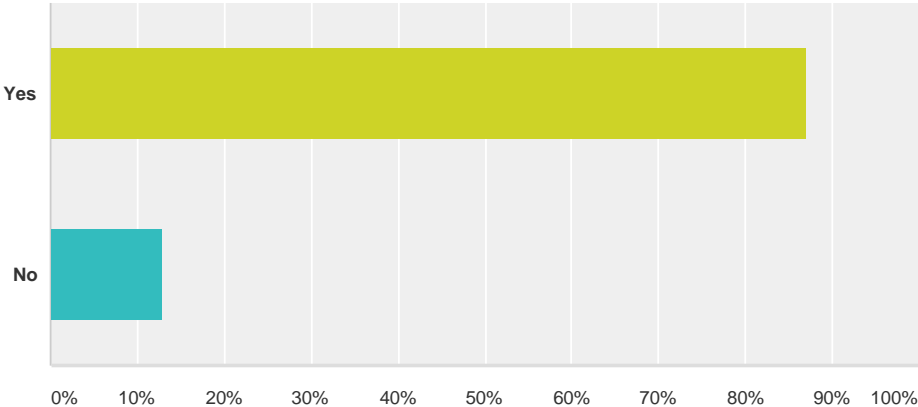
Answered: 23 Skipped: 0



Answer Choices	Responses	
Yes	86.96%	20
No	13.04%	3
Total		23

Q9 Do you hold an undergraduate degree?

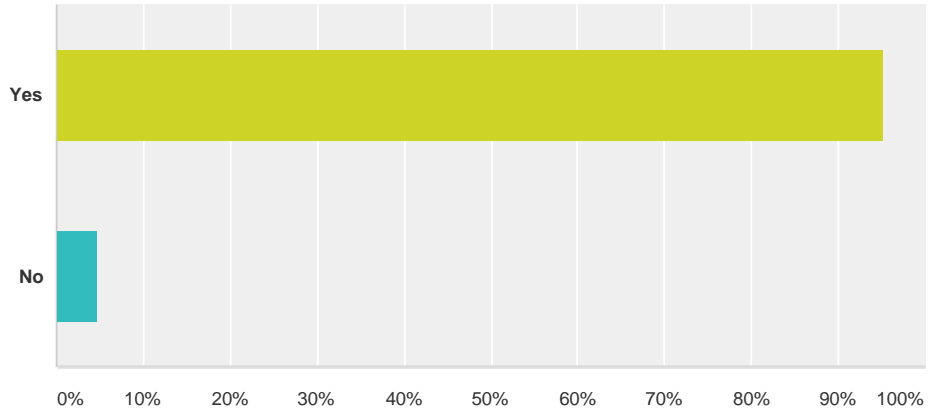
Answered: 23 Skipped: 0



Answer Choices	Responses	
Yes	86.96%	20
No	13.04%	3
Total		23

Q10 Would you apply for a program such as this, if you didn't hold an undergraduate degree and there was a way you could be accepted based on life experience?

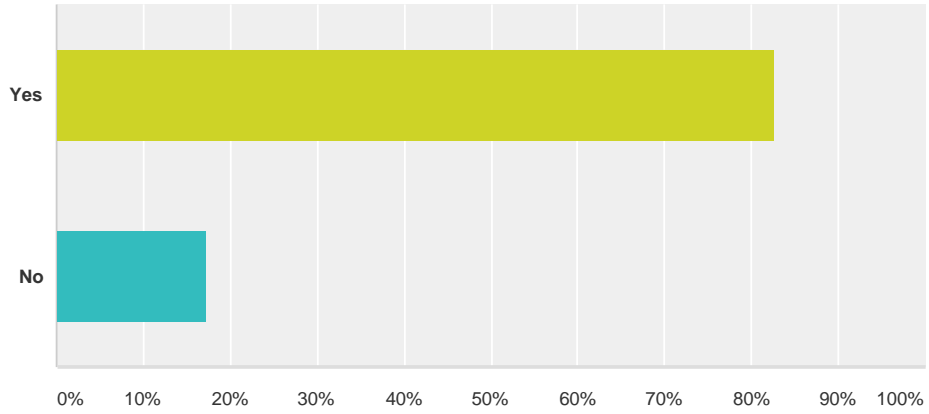
Answered: 21 Skipped: 2



Answer Choices	Responses
Yes	95.24% 20
No	4.76% 1
Total	21

Q11 If there an option to apply this certificate to a diploma and then a course based master degree, would it be more appealing to you and/or your organization?

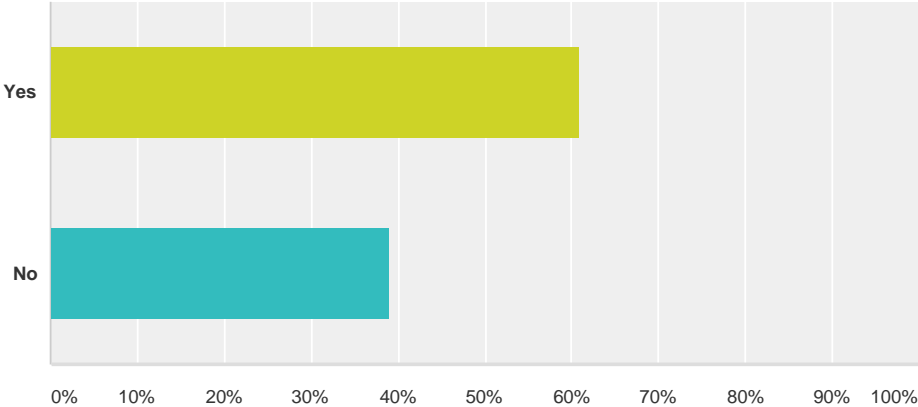
Answered: 23 Skipped: 0



Answer Choices	Responses
Yes	82.61% 19
No	17.39% 4
Total	23

Q12 Do you have access to professional development funding?

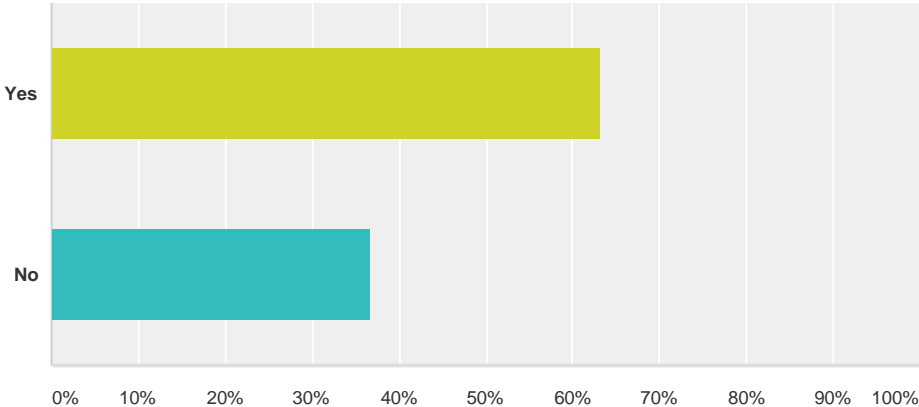
Answered: 23 Skipped: 0



Answer Choices	Responses
Yes	60.87% 14
No	39.13% 9
Total	23

Q13 Would this type of program be eligible?

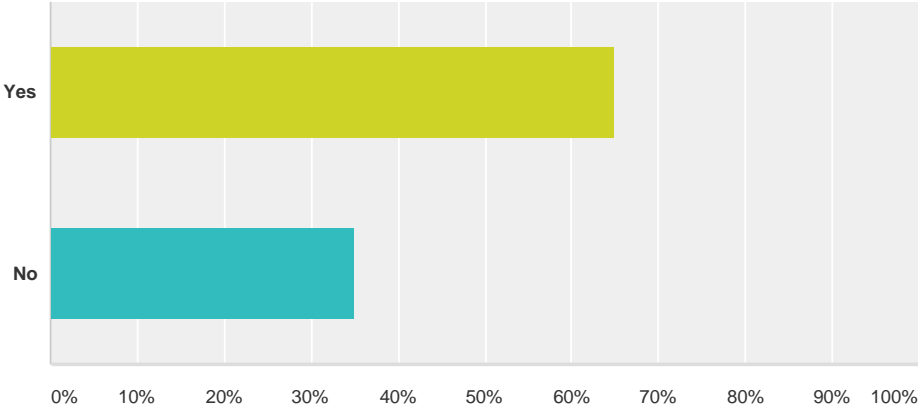
Answered: 19 Skipped: 4



Answer Choices	Responses	
Yes	63.16%	12
No	36.84%	7
Total		19

Q14 Would you consider using your PD funding for a program such as this?

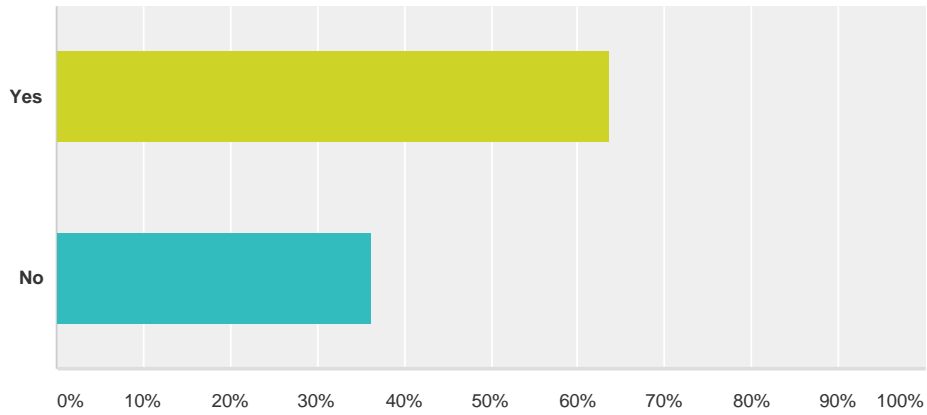
Answered: 20 Skipped: 3



Answer Choices	Responses	
Yes	65.00%	13
No	35.00%	7
Total		20

Q15 Tuition for this course is approximately \$6800 (subject to change), which includes courses, instructor fees, one-week intensive, conference fees, and lodging; do you feel this is a reasonable price for the value you are receiving?

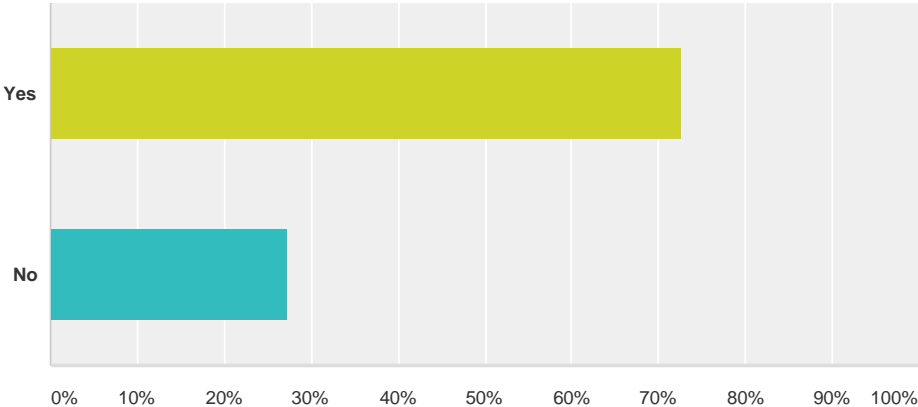
Answered: 22 Skipped: 1



Answer Choices	Responses	
Yes	63.64%	14
No	36.36%	8
Total		22

Q16 Is a cohort model appealing to you?

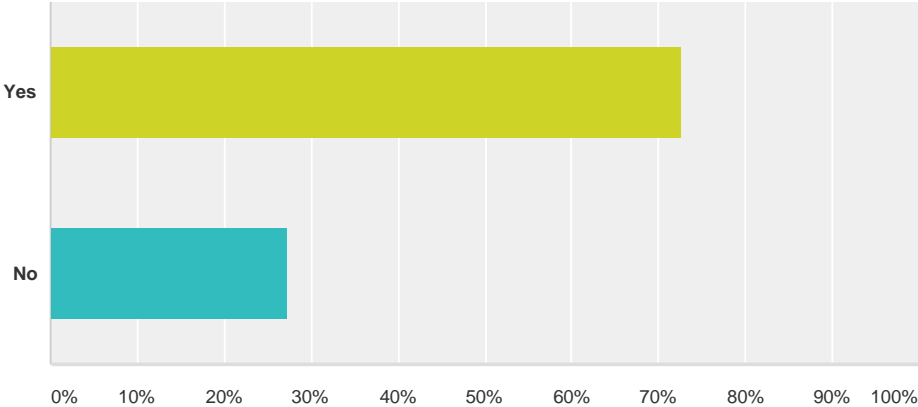
Answered: 22 Skipped: 1



Answer Choices	Responses	
Yes	72.73%	16
No	27.27%	6
Total		22

Q17 Do you think, as a student, you would be more successful if you were in a cohort?

Answered: 22 Skipped: 1

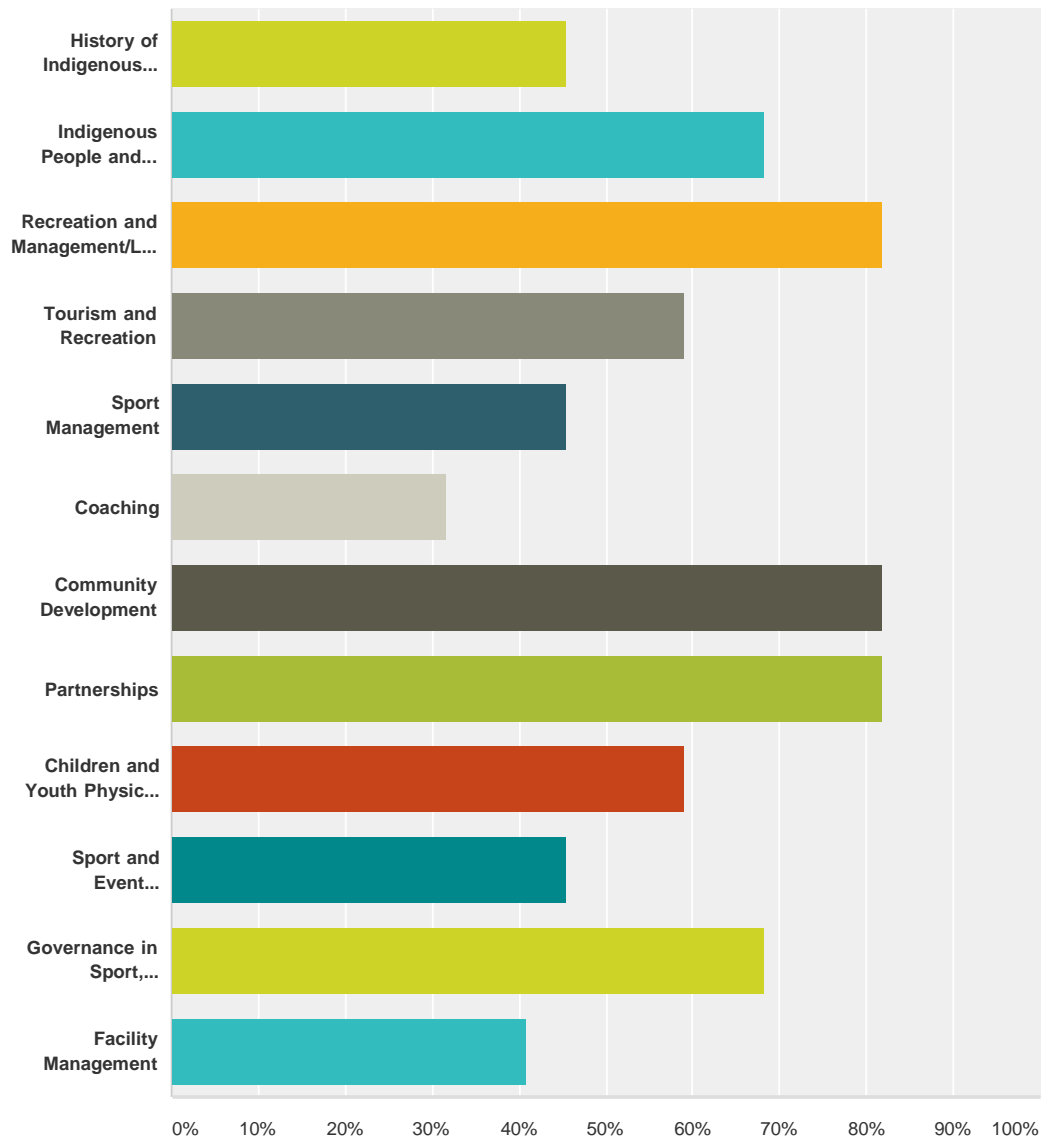


Answer Choices	Responses	
Yes	72.73%	16
No	27.27%	6
Total		22

Indigenous Sport and Recreation

Q18 What areas would interest you in a program such as this (check all that apply):

Answered: 22 Skipped: 1



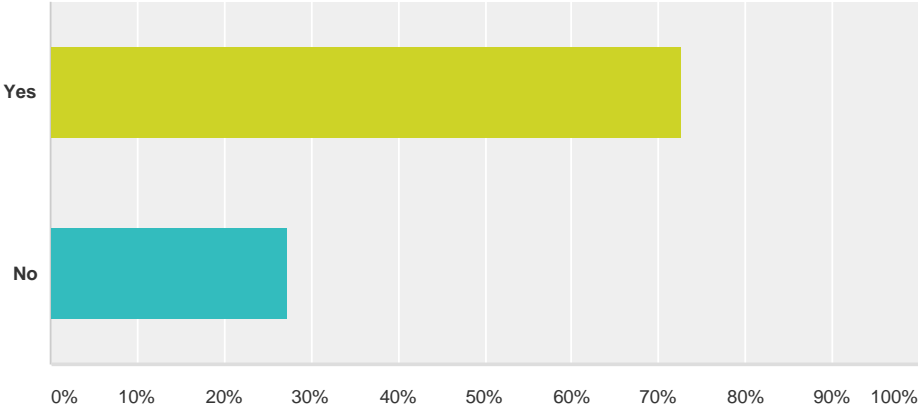
Answer Choices	Responses
History of Indigenous People	45.45% 10
Indigenous People and Physical Activity	68.18% 15
Recreation and Management/Leadership	81.82% 18
Tourism and Recreation	59.09% 13
Sport Management	45.45% 10
Coaching	31.82% 7
Community Development	81.82% 18

Indigenous Sport and Recreation

Partnerships	81.82%	18
Children and Youth Physical Activity/Recreation	59.09%	13
Sport and Event Management	45.45%	10
Governance in Sport, Recreation and Leisure	68.18%	15
Facility Management	40.91%	9
Total Respondents: 22		

Q19 Is this something you might be interested in taking?

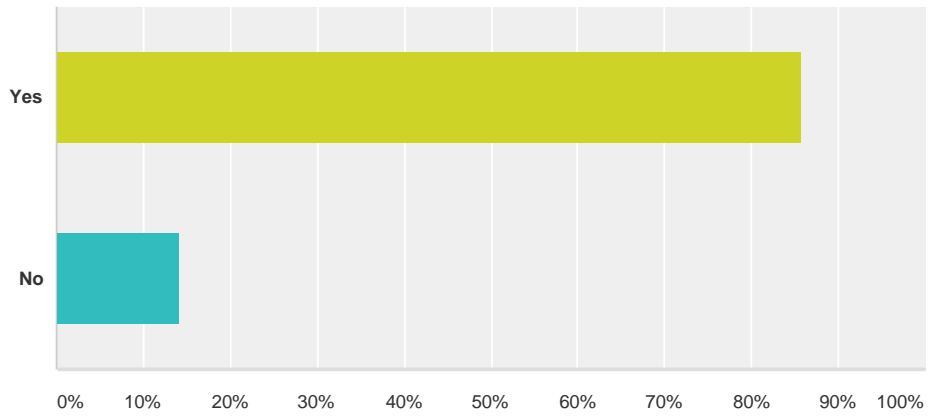
Answered: 22 Skipped: 1



Answer Choices	Responses	
Yes	72.73%	16
No	27.27%	6
Total		22

Q20 Is this something you know others might be interested in taking?

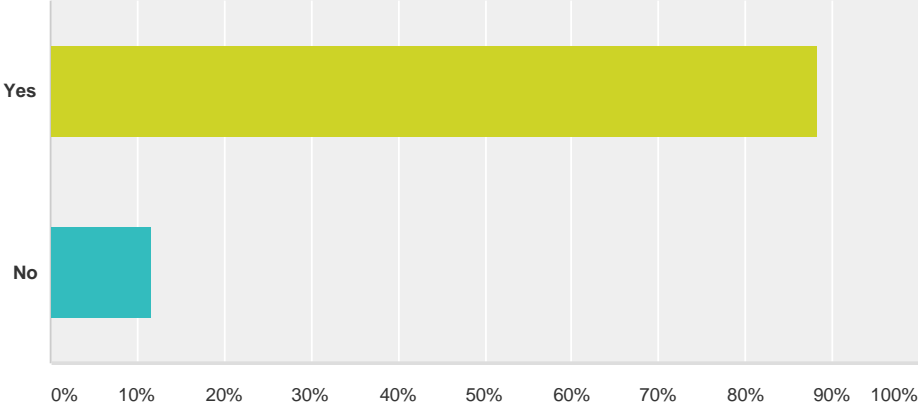
Answered: 21 Skipped: 2



Answer Choices	Responses	
Yes	85.71%	18
No	14.29%	3
Total		21

Q21 If you are an employer, would you support your staff if they requested this program to take?

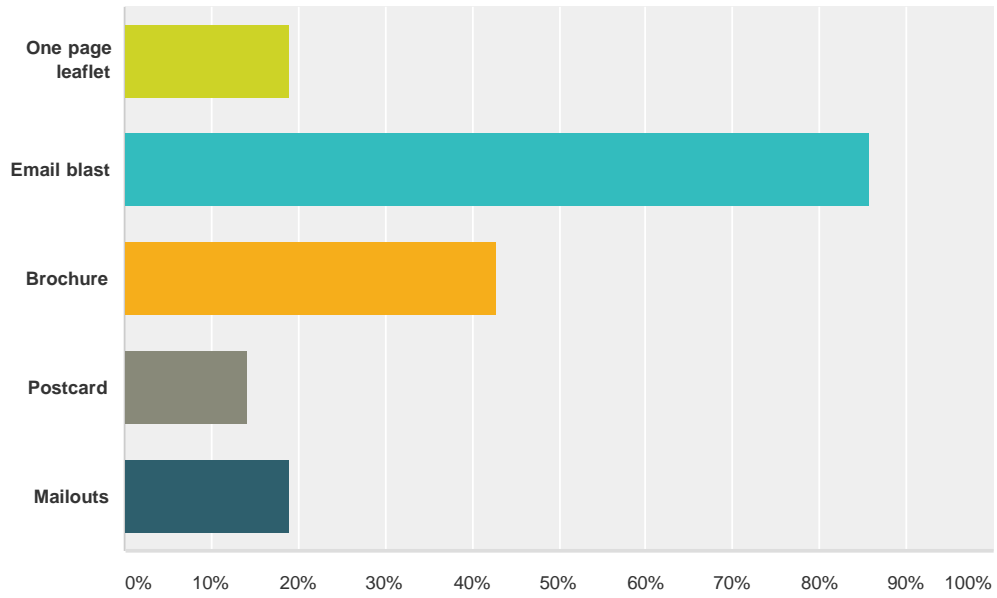
Answered: 17 Skipped: 6



Answer Choices	Responses
Yes	88.24% 15
No	11.76% 2
Total	17

Q22 How would you market this program to the public?

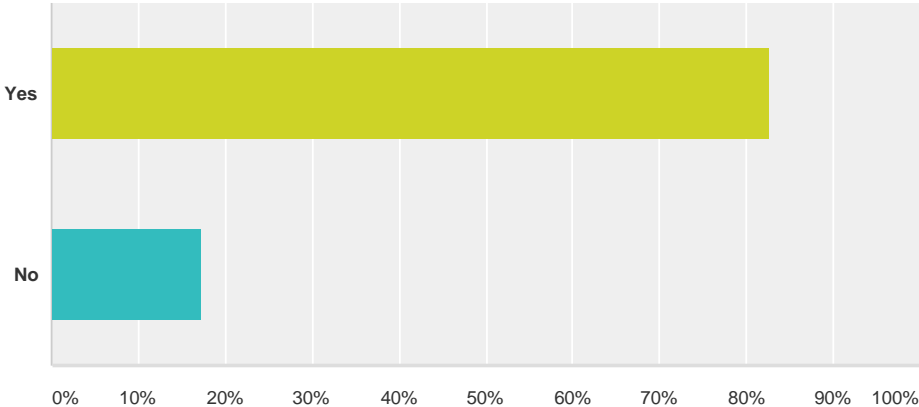
Answered: 21 Skipped: 2



Answer Choices	Responses
One page leaflet	19.05% 4
Email blast	85.71% 18
Brochure	42.86% 9
Postcard	14.29% 3
Mailouts	19.05% 4
Total Respondents: 21	

Q23 Do you currently work in Recreation?

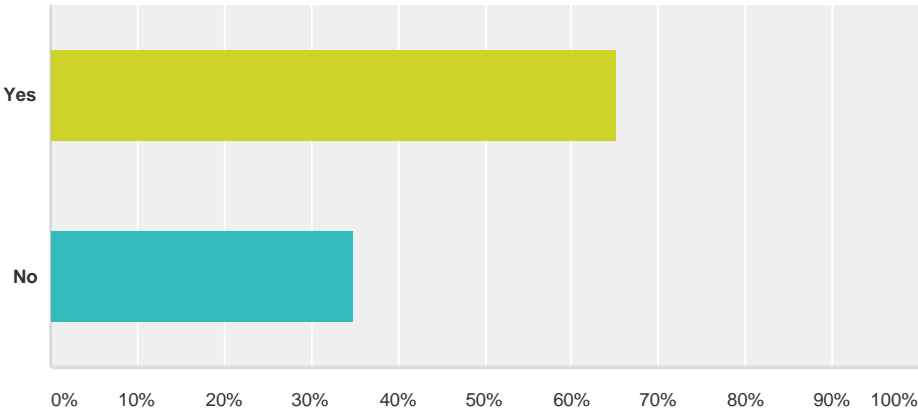
Answered: 23 Skipped: 0



Answer Choices	Responses	
Yes	82.61%	19
No	17.39%	4
Total		23

Q24 Do you work in with an Aboriginal Population group?

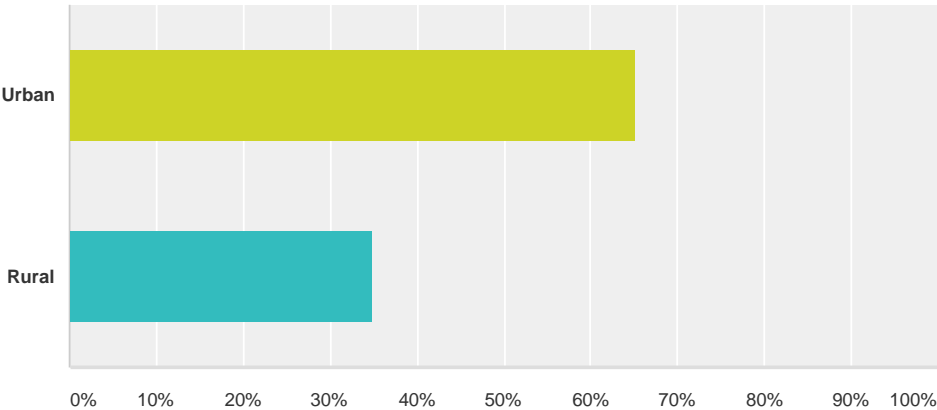
Answered: 23 Skipped: 0



Answer Choices	Responses	
Yes	65.22%	15
No	34.78%	8
Total		23

Q25 Are you located in an Urban or Rural community?

Answered: 23 Skipped: 0

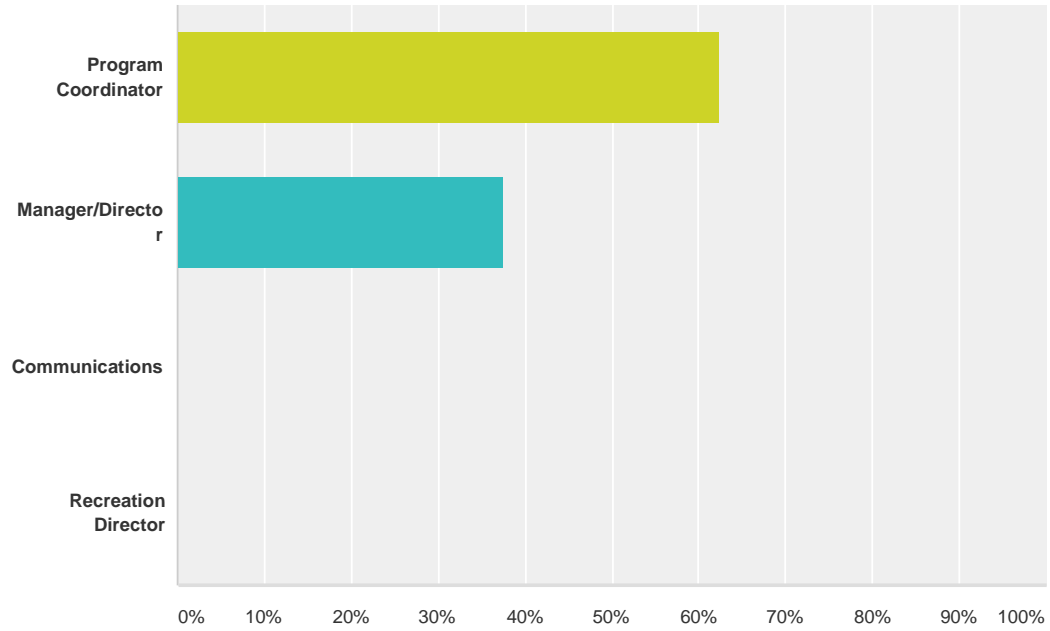


Answer Choices	Responses
Urban	65.22% 15
Rural	34.78% 8
Total	23

Indigenous Sport and Recreation

Q26 What is your current position:

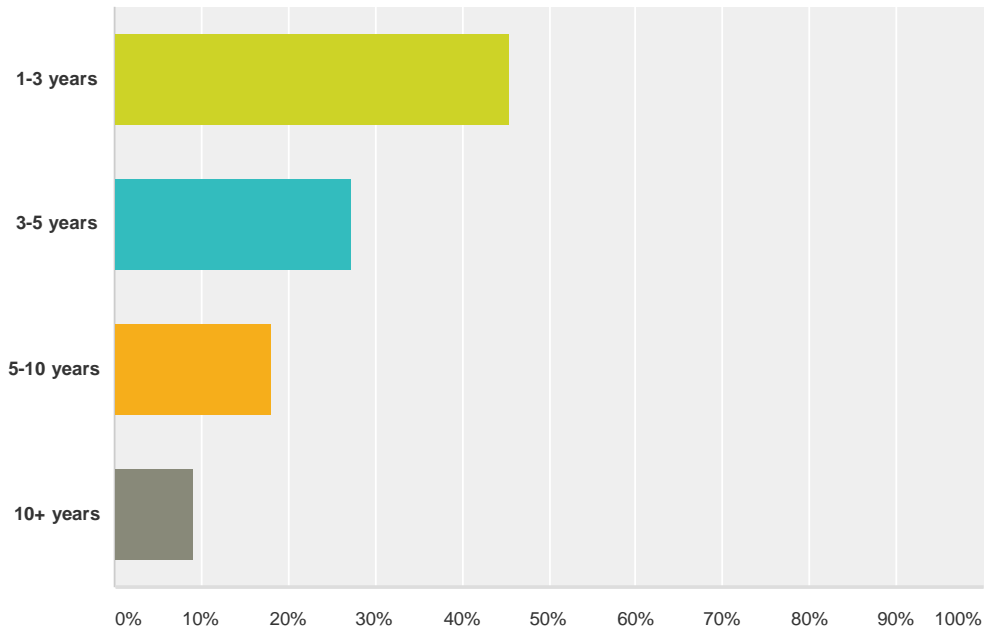
Answered: 16 Skipped: 7



Answer Choices	Responses
Program Coordinator	62.50% 10
Manager/Director	37.50% 6
Communications	0.00% 0
Recreation Director	0.00% 0
Total	16

Q27 How long have you been in your current position?

Answered: 22 Skipped: 1



Answer Choices	Responses
1-3 years	45.45% 10
3-5 years	27.27% 6
5-10 years	18.18% 4
10+ years	9.09% 2
Total	22

Q28 *Optional: Where are you currently located? Please include city and province/state.

Answered: 10 Skipped: 13

Appendix 7

CPRA Letter of Support



March 2, 2015

Dr. Kerry Mummery, Dean
Faculty of Physical Education and Recreation
University of Alberta
116 St & 85 Ave Edmonton, AB T6G 2R3

Office of the Dean
Faculty of Physical Education & Recreation

MAR 16 2015

Received

Dear Dr. Mummery,

Thank you for your letter dated February 9, 2015. The Canadian Parks and Recreation Association (CPRA) would like to commend the University of Alberta and the Faculties of Physical Education and Recreation, and Native Studies on their efforts to establish a graduate level certificate in Indigenous Sport and Recreation.

As you know, CPRA will be launching its national professional development certification program this spring. We view your certificate as part of a collaborative effort between the field of practice and academia to build recreation capacity.

As identified in the *Framework for Recreation in Canada 2015: Pathways to Wellbeing*, professional development and professional education are critical to ensuring the continued growth and sustainability of the recreation field. As part of the growing process, we would encourage the Faculty of Physical Education and Recreation and the Faculty of Native Studies to consider a Prior Learning Assessment Recognition (PLAR) for those members in our profession that do not possess an undergraduate degree.

We wish your certificate a great deal of success and are committed to working with our practitioners to align your certificate, where possible, within our professional development certification program.

Sincerely,

Dean Gibson, President
CPRA

Appendix 8

UofA Letter of Support

August 6, 2015

Dr. Kerry Mummery, Dean
Faculty of Physical Education and Recreation
University of Alberta
WI -34 Van Vliet Centre
Edmonton, AB T6G 2H9



Dear Dr. Mummery,

The Alberta Recreation and Parks Association is pleased to provide this letter of support for a new post baccalaureate certificate in Indigenous Sport and Recreation. There is a strong need for further advanced education in the area of Recreation and more specifically, with an Indigenous theme not only in Alberta but across Canada.

This new program will align itself nicely with the Canadian Parks and Recreation Association's National Professional Development program.

The inclusion of "life-experience " that has becoming an accepted admission criteria for programs of this nature will increase the interest and participation in this exciting new program.

The Alberta Recreation and Parks Association will be an advocate both here in Alberta and across Canada of this program as reflected in this letter. We wish this certificate great success and looking forward to the launch date.

Sincerely,

William A. Wells
Chief Executive Officer
arpa@arnaonline.ca

Appendix 9

Connecting the Dots: Aboriginal Workforce and Economic Development in Alberta

Connecting the Dots:

Aboriginal Workforce and Economic Development in Alberta

June 2010 - Report of the MLA Committee on the First Nations,
Métis and Inuit Workforce Planning Initiative

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Introduction from the Chair

On behalf of my MLA colleagues, Pearl Calahasen (Lesser Slave Lake), Tony Vandermeer (Edmonton-Beverly-Clareview), and Evan Berger (Livingstone-Macleod), I am pleased to submit the *Report of the MLA Committee on the First Nations, Metis and Inuit Workforce Planning Initiative*.

The backdrop for our assignments that Aboriginal people in Alberta continue to be under-represented in Alberta's workforce. The mandate given us was to see what could be done to increase Aboriginal participation in Alberta's workforce and economy. We were asked specifically to engage in a conversation with elected First Nations and Metis leaders, on a government-to-government basis, to see how we might work together in a way which would be beneficial for all Albertans, and most particularly Aboriginal Albertans. Underpinning this initiative was our Government's respect for the notion that solutions must come from local communities, and be supported by government, not the other way around.

Like many Albertans, I am somewhat aware of challenges faced by Aboriginal people. Speaking personally, I can say that my time on this Committee has been a great education for me. It has taught me more about the rich history and tradition of Aboriginal people, and of struggles that have roots which are centuries old. It has also taught me that there are many good news stories that few ever hear about, and there is unlimited potential in the fastest growing and youngest segment of Alberta's population. I have learned that there is what sometimes feels like a dizzying array of agencies from many levels of government as well as Aboriginal, educational and business communities, all with good intentions, who are trying to deal with the issues which will be addressed in this Report.

Most of our discussions centered on jobs, education and economic development. We have learned that each community is unique, with its own strengths and challenges. We have also recognized many common themes. None was more dominant than the importance of education as a crucial element to the success of First Nations, Metis and Inuit people.

My sense is that the dialogue about these issues is sometimes hampered by flawed assumptions, suspicion and frustration. One of the challenges for anyone working in this area is to ensure that they are armed with facts and reliable data, as opposed to stereotypes. There is also a tendency to focus on the negative. While the challenges are many, it is my hope that the work of this Committee will be a catalyst for positive action, optimism and a sense of partnership and common cause amongst all concerned.

As we travelled the province, we were asked many times what the result of our discussions would be. We were told that many had come before us; there had been lots of talk, but little in the way of concrete action. Therefore, you will see that one of our key recommendations is that the dialogue between the Government of Alberta, Aboriginal governments and the Government of Canada continue, with the commitment of all being that leads to real action that makes a difference.

We have, over an 18-month period, had the privilege of meeting with many elders, elected leaders, community members and representatives of agencies, governments and industry. We have been welcomed into communities and people have spent time with us, giving their perspectives as to the challenges that Aboriginal people face and possible ways to overcome those challenges. On behalf of all members of our Committee, and all supporting staff from the Ministries of Employment and Immigration and Aboriginal Relations, I want to say "thank you" for your hospitality, wisdom and good will. I also want to acknowledge the hard work, commitment, patience and professionalism of the government staff and consultants who were with us every step of the way.

Verlyn Olson

MLA, Wetaskiwin-Camrose

Chair, MLA Committee on the

First Nations, Metis and Inuit Workforce Planning Initiative

Executive Summary

In 2008, the Ministers of Employment and Immigration and Aboriginal Relations appointed the MLA Committee on the First Nations, Métis and Inuit Workforce Planning Initiative. Over an 18-month period, the MLA Committee led an engagement process that included government-to-government meetings with First Nations and Métis leaders: urban Aboriginal dialogues; and meetings with educational institutions, training providers, service delivery, community and economic development organizations, other levels of government, employers, and industry. The focus of the engagement was increasing the participation of Aboriginal people in Alberta's work force and economy.

The term 'engagement' was not lightly chosen. This engagement process went beyond consultation. The province wanted to know what Aboriginal Albertans felt the challenges were: what outcomes they wanted; and how they wanted the province to help them achieve those outcomes.

There were many good news stories and promising practices. The education and employment outcomes of Aboriginal Albertans continue to increase. Unfortunately, it's not enough. There were many more stories about Aboriginal people and communities who continue to face barriers and challenges to education, training, and economic opportunity.

The Committee received many suggestions on *what* needs to be done, and just as many suggestions on *how* things should be done. We heard about numerous programs and services for Aboriginals in Alberta, but we also heard about the need for more coordination, awareness and effectiveness. The critical message was that for real change and improved results for Aboriginal people in Alberta, things would have to be done differently.

From all the discussions, input and information gathered the Committee has made 30 recommendations, which are outlined in the accompanying table.

For an explanation of terminology and acronyms used in the Report, see **Appendix A**. For a list of engagement participants, see **Appendix B**.

Six themes stood out as compelling from the engagement process. The themes are tools for how to move forward on the recommendations.

1. Collaboration

- The need for the province and First Nations, the Métis Nation of Alberta Association (MNAA), the Métis Settlements General Council (MSGC) and other Aboriginal communities to work *together* and to create partnerships with other levels of government, industry and education and training institutions. Collaboration will require a joint planning process that works with Aboriginal communities to build a bridge between where they are and where they want to be. Joint planning can also determine who is accountable for doing what needs to be done.

2. Coordination

- » Better coordination will help to align goals and resources in a manner that addresses the challenges effectively, without duplication of efforts or means. Better coordination is needed across the Government of Alberta, Aboriginal governments, communities and organizations, and with other levels of government.

3. Community

- » Aboriginal communities want to determine the issues, obstacles and challenges they need to focus on in relation to increasing employment and economic opportunities. The Aboriginal peoples of Alberta are diverse and some communities have different needs than others.

4. Capacity

- » Equipping Aboriginal people and communities with the education, knowledge, ability, and technology to increase their participation in the workforce and economy is critical to their future and Alberta's future productivity and competitiveness.

5. Communication

- » In spite of the programs and services available for First Nations, Métis and Inuit people there are awareness gaps. Not enough Aboriginal communities are aware of the resources and supports they could access. Not enough communication is happening between government departments. And not

enough Albertans are aware of the positive stories coming out of some Aboriginal communities. Improving what and how we communicate will help to connect the dots.

6. Commitment

- » It will take relationships, commitment and political will to make the kinds of changes that are needed to improve the employment and economic situation for Aboriginal Albertans. Commitment means continuing the dialogue between political leaders. Commitment also means working with different jurisdictions to create partnerships that lead to action and results.

The recommendations that follow address what needs to be done. Some are specific to the Government of Alberta, many are focused on the collective efforts of Aboriginal leaders, communities and organizations, different levels of government and stakeholders. Increasing the participation of Aboriginal people in Alberta's workforce and economy can only be achieved if their educational attainment is also increased.

This re-alignment of how government, Aboriginal communities, industry, training providers and educational institutions work together will take time and effort, however, we need a new way of doing things if we want to get the results we all want to see.

MLA Committee Recommendations

Collaboration

1. In collaboration with First Nations, Metis Settlements General Council (MSGC), Metis Nation of Alberta Association (MNAA), and other Aboriginal communities, the Government of Alberta continue to support the development and implementation of community-based collaborative workforce action plans. (p.45)
2. The Government of Alberta, in partnership with First Nations, develop strategies to press the federal government to address any inequities in Kindergarten to Grade 12 education funding which impedes First Nation student success. (p. 19)
3. The Province, First Nations, MSGC, MNAA, other Aboriginal organizations, and the federal government increase collaboration to improve coordination, reduce duplication, and increase innovation in the delivery of labour market programs and services for Aboriginal people in Alberta. (p. 25)
4. The Government of Alberta, First Nations, MSGC, MNAA, and other Aboriginal organizations increase collaboration to determine employment and training program needs in order to take advantage of opportunities with local industry. (p. 26)
5. The Government of Alberta examine the system of standards and safety certification imposed by industry to determine if it acts as a deterrent to employment and entrepreneurship for Aboriginal people. (p. 39)

Coordination

6. The Government of Alberta review the array of programs and services it delivers and/or funds to support Aboriginal employment and labour market training with the goal of increasing coordination, creating efficiencies, streamlining processes and reporting requirements, and, eliminating duplication. (p.26)
7. The Government of Alberta and Aboriginal communities engage with training providers and educational institutions to improve the quality of learner assessments (i.e. abilities, skills, interests, job prospects, etc.) to ensure an optimum fit between a client's career aspirations and government-funded training opportunities. (p. 27)
8. The Government of Alberta, educational institutions, training providers, and Aboriginal communities review policies related to learner assessments and eligibility (as it relates to Aboriginal learners) with a view to increasing flexibility or creating efficiencies. (p. 27)
9. Expand the length of time allowed for Aboriginal learners (who receive government funding for training) to complete academic upgrading if they have had a government-approved literacy assessment that identifies more time is required to be successful. (p.29)
10. All Government of Alberta departments that provide funding for Aboriginal economic development adopt a cross-ministry strategic approach that increases coordination, joint planning, transparency, and assessment of viable opportunities for Aboriginal communities. (p. 36)
11. The Province adopt ways to enhance transitional support services in major urban settings in partnership with urban Aboriginal organizations, such as Friendship Centres, and in collaboration with other levels of government. (p.43)

MLA Committee Recommendations

Community

12. Aboriginal communities, school boards and parents, with the help of the province where appropriate, develop and implement strategies for increased opportunities for Aboriginal families to become more involved in the education of their children. (p. 20)
13. The Government of Alberta actively engage with First Nations, MSGC, MNAA, and other Aboriginal organizations to develop skills inventories, local level data, and labour market studies that can be used to support long-term community, workforce and economic development planning. (p.33)
14. The Province continue to support and foster urban Aboriginal partnerships and initiatives that address the employment, education and economic development priorities of urban Aboriginal communities. (p.43)
15. The Government of Alberta explore ways to maximize the effectiveness of First Nations Colleges in Alberta given their unique location, status and program focus on Aboriginal student success. (p. 22)

Capacity

16. The Government of Alberta develop and implement a cross-ministry employment strategy to attract, recruit and retain qualified Aboriginal people into the Alberta Public Service. (p. 46)
17. The Government of Alberta support individual and organizational capacity development for First Nations, MSGC, MNAA, and other Aboriginal organizations through exchange opportunities, such as internships, secondments and mentoring. (p. 32)
18. The Government of Alberta ensure that rural and remote Aboriginal people and communities have internet-based options for accessing education and training to prepare for employment and lifelong learning. (p. 21)
19. Given the increasing number of temporary foreign workers employed in the province, the Government of Alberta work with the Government of Canada to promote the hiring of Aboriginal people in Alberta. (p. 39)
20. First Nations, MSGC, MNAA, and other Aboriginal organizations work with all levels of government and partner organizations to create an environment for encouraging more entrepreneurial activity in Aboriginal communities across Alberta. (p. 36)
21. The Government of Alberta press the federal government to expand information technology infrastructure on reserve to ensure First Nations people living on reserves in Alberta are able to access internet services for the purposes of education, training, business and economic development. (p. 32)
22. The Government of Alberta partner with MSGC, MNAA, and other Aboriginal organizations to ensure Aboriginal people and their communities are able to access internet services for the purposes of education, training, business and economic development. (p. 32)
23. First Nations, MSGC, MNAA, and other Aboriginal organizations pursue partnerships with other levels of government, business, industry, and training providers to provide information technology (IT) resources (i.e. hardware and software) and training to take advantage of internet connectivity. (p. 32)

MLA Committee Recommendations

Communication

24. The Government of Alberta, First Nations, MSGC, MNA, and other Aboriginal communities, develop and implement strategies with other levels of government, business, industry, and organizations to eliminate racism and to increase awareness of the contributions of Aboriginal peoples, cultures and communities to Alberta. (p.18)
25. The Government of Alberta explore ways to improve communication with First Nations, Matis and other Aboriginal communities and organizations about provincial programs and services for Aboriginal people, and to improve awareness and linkages across ministries that serve Aboriginal people. (p.47)
26. Employment and Immigration ensure Aboriginal people in Alberta can access provincial career counseling and employment services that are available to all Albertans. (p. 30)
27. Ensure that Aboriginal people and communities are aware that provincially-funded English-as-a-Second Language programs may be available to eligible Aboriginal learners. (p. 29)

Commitment

28. In keeping with the Province's commitment to a long-term workforce strategy, the Government of Alberta develop an Aboriginal Workforce Strategy, informed by the FNMI Workforce Planning initiative and engagement process. (p. 48)
29. Further engagement regarding workforce participation and economic development continue on a government-to-government basis through new or existing mechanisms, agreements or arrangements. (p.48)
30. The dialogue between the Government of Alberta, First Nations, MSGC, MNA, and other Aboriginal communities, and the Government of Canada continue. With the commitment of all being that it leads to real action that makes a difference. (p. 48)

MLA Committee Membership and Mandate

In 2008, the Government of Alberta launched the First Nations, Métis and Inuit (FNMI) Workforce Planning Initiative, co-led by Employment and Immigration and Aboriginal Relations and supported by Education and Advanced Education and Technology. The overall goal of this initiative is to increase the participation of Aboriginal people in Alberta's workforce and economy. On September 2, 2008, the Ministers of Employment and Immigration and Aboriginal Relations appointed the *MLA Committee on the First Nations, Métis and Inuit (FNMI) Workforce Planning Initiative*. The Committee members consisted of:

- Verlyn Olson (Chair)
MLA, Wetaskiwin-Camrose
- " Pearl Calahasen
MLA, Lesser Slave Lake
- " Tony Vandermeer
MLA, Edmonton-Beverly-Clareview
- » Evan Berger
MLA, Livingstone-Macleod

The role of the Committee was to champion the initiative. Its mandate included the following activities:

- » engage on a government-to-government basis with First Nations and Métis leaders and officials across Alberta;
- » participate in urban Aboriginal dialogues with representatives of urban Aboriginal community organizations (First Nation, Métis, and Inuit) and service providers;

- » meet with representatives of industry, employers, educational institutions and training providers; and
- » prepare a final report on the engagement process with recommendations and/or policy options.

The term of the Committee expired on May 31, 2010; the FNMI Workforce Planning Initiative is ongoing.

Our Engagement Process

In 2006, the Government of Alberta released its long-term labour force strategy, *Building and Educating Tomorrow's Workforce* (BETW). It recognized that Aboriginal people in Alberta are underrepresented in the workforce and that increasing participation among First Nations, Métis and Inuit peoples was a priority. While it was clear that the Government of Alberta was committed to increasing the labour market and economic participation of Aboriginal people, what was less clear was the best way to go about this.

Community Action Plans

Between 2006 and 2007, the Ministry of Employment and Immigration worked with First Nations and Métis representatives to create "community action plans." The intent of these plans was for the community to identify issues and barriers to employment from a community perspective. In all, thirteen community action plans were developed and shared with the Government of Alberta.

In response to these plans, the Government of Alberta created a draft *First Nations, Metis and Inuit Workforce Action Plan*. The original plan was to go forward with a typical consultation process to obtain input and feedback on the draft plan. However, a few things happened along the way that would change the direction the government was heading.

From Consultation to Engagement

The Government was hearing from First Nations and Metis representatives that the process needed to be more inclusive of their governments and organizations. Moving forward would require leadership support. To respond to the request to work more inclusively with First Nations and Metis communities and to engage leadership, our four-member FNMI Workforce Planning Initiative MLA Committee was appointed.

Three other key developments also happened in 2008:

- » In May 2008, the GOA and the Grand Chiefs of Treaties 6, 7 and 8 signed the *Historic Protocol Agreement on Government to Government Relations*. This agreement recognized the need to strengthen relations and work together to address issues of mutual importance.
- » In June 2008, the GOA and the Metis Nation of Alberta Association (MNAA) signed a seven-year Framework Agreement to work together towards enhancing the economic and community well-being of Alberta's Metis people.

- » In September 2008, the GOA and the Metis Settlements General Council (MSGC) signed a three-year interim funding agreement to support ongoing efforts to improve local autonomy and economic self-sufficiency for the province's eight Metis Settlements.

About the same time, a concept known as "public engagement" was brought to the attention of Government. This model is based on "dialogue" that brings various parties together to jointly discuss and identify issues, problems, solutions, actions, and responsibilities. The ministries co-leading this initiative, Employment and Immigration and Aboriginal Relations, adopted a modified version of this concept. With the appointment of our MLA Committee, which would meet with First Nations and Metis leadership, the government hoped to have an "engagement process" that was respectful of the government-to-government relationship and that would provide the opportunity for open dialogue about Aboriginal workforce and economic participation.

This new engagement process would reflect the spirit of the Protocol Agreement and would respect the goals of the Metis Nation of Alberta Association (MNAA) Framework Agreement and the Metis Settlements General Council (MSGC) interim funding agreement.

For us, what made an engagement different from a consultation was that it acknowledged the role of Aboriginal communities in determining their strengths and challenges and sharing their vision for increasing workforce participation and economic development. The hope was this engagement approach would

be a more positive, inclusive process and would support FNMI communities and leaders in bringing their interests, issues and ideas forward and actively involving them in the implementation of solutions. The original community action plans would be used to help launch discussions.

Engaging with Leaders, Communities, and Stakeholders

On July 29, 2008, Cabinet gave approval to proceed with an "engagement" and in September 2008, this MLA Committee was appointed to lead this engagement process on behalf of the GOA.

We looked forward to the opportunity to meet with First Nation and Metis leadership in their communities or in a location that was convenient for everyone.

Over the past 18 months, our Committee made:

- » *community visits* to four First Nations, a Metis Settlement, the Aseniwuche Winewak Nation (AWN) and the community associations of Peerless Lake and Trout Lake;
- » held 15 *engagement meetings* with elected leadership of First Nations, Metis Nation of Alberta Association (MNAA), and the Matis Settlement General Council (MSGC);
- » hosted *urban Aboriginal dialogues* in five major urban centres; and
- » met on 17 different occasions with representatives of employers, industry, business, educational institutions, and other levels of government. (Details appear in **Appendix B**).

Aboriginal People and the Workforce

This engagement process provided us with an opportunity to experience first hand the diversity amongst Alberta's Aboriginal peoples. According to the 2006 census, Alberta has the third-largest Aboriginal population in Canada. The Canadian Constitution recognizes three groups of Aboriginal people: Indian (First Nation), Metis, and Matis. In Alberta, 188,365 people identified themselves as Aboriginal: 52 per cent as First Nations, 45 per cent as Matis, less than one per cent as Inuit. These are three distinct peoples with unique histories, languages, cultures, and beliefs.

Approximately 63 per cent of Alberta's Aboriginal population lives in urban centres. Edmonton is home to the second largest urban Aboriginal population in Canada (after Winnipeg). Calgary has the fifth largest urban Aboriginal population. Aboriginal people also make up a significant portion of the population in several smaller urban centres in Alberta, including Fort McMurray, Grande Prairie, and Lethbridge. Many Aboriginal people have lived their entire lives in Alberta's urban centres but there has also been significant migration to cities from reserves, settlements, and rural and remote communities throughout the province.



First Nations in Alberta

Treaty 6

1. Alexander First Nation
2. Alexis Nakota Sioux First Nation
3. Beaver Lake Cree Nation
4. Cold Lake First Nations
5. Enoch Cree Nation
6. Ermineskin Cree Nation
7. Frog Lake First Nation
8. Heart Lake First Nation
9. Kehewin Cree Nation
10. Louis Bull Tribe
11. Montana First Nation
12. O'Chiese First Nation
13. Paul First Nation
14. Saddle Lake First Nation
15. Samson Cree Nation
16. Sunchild First Nation
17. Whitefish Lake First Nation
#128 (Goodfish Lake)
37. Loon River First Nation
38. Lubicon Lake Indian Nation
39. Mikisew Cree First Nation
40. Sawridge First Nation
41. Smith's Landing First Nation
42. Sturgeon Lake Cree Nation
43. Sucker Creek First Nation
44. Swan River First Nation
45. Tallcree First Nation
46. Whitefish Lake First Nation (Atikameg)
47. Woodland Cree First Nation

Metis Settlements in Alberta

- | | |
|--------------|----------------|
| Buffalo Lake | Gift Lake |
| East Prairie | Kikino |
| Elizabeth | Paddle Prairie |
| Fishing Lake | Peavine |

Treaty 7

18. Blood Tribe
19. Ft. Kani Nation
20. Siksika Nation
Stoney Tribe:
 21. Bearspaw (Eden Valley)
 22. Chiniki (Morley)
 23. Wesley (Big Horn)
24. TsuuTina Nation

Treaty 8

25. Athabasca Chipewyan First Nation
26. Beaver First Nation
27. Bigstone Cree Nation
28. Chipewyan Prairie First Nation
29. Dene Tha' First Nation
30. Driftpile First Nation
31. Duncan's First Nation
32. Fort McKay First Nation
33. Fort McMurray First Nation
34. Horse Lake First Nation
35. Kapawe'no First Nation
36. Little Red River Cree Nation

Map Legend

- Treaty 4 (1894)
- D Treaty 6 (1876)
- D Treaty 7 (1877)
- D Treaty 8 (1899)
- D Treaty 10 (1906)
- Treaty Boundary
- Metis Nation of Alberta
Association Regional Zones
- ® First Nation in Alberta
- D Metis Settlement
- City/Town

First Nations

There are 47 First Nations in Alberta and 134 Reserves covering three Treaty areas (Treaties 6, 7 and 8). According to the 2006 census, 92,275 people identified as First Nation. Some First Nations are affiliated with tribal councils which work together on behalf of their member First Nations on political, policy or regional issues, such as workforce participation and economic development.

Metis

According to the 2006 census, Alberta is home to 85,495 Metis people, Canada's largest Metis population. There are two primary Metis representative bodies in Alberta: the Metis Settlements General Council (MSGC) and the Metis Nation of Alberta Association (MNAA). The MSGC is the political and administrative body for the collective interests of the eight Alberta Metis Settlements, which cover 1.25 million acres. Alberta is the only province that has a Metis land base and governance structure entrenched in provincial statute. As of 2009, there were 7,990 Settlement members. The MNAA is the representative voice for its approximately 35,000 members. The MNAA's mission is to advance the socio-economic and cultural wellbeing of the Metis people of Alberta.

Inuit

Most Inuit people live in Canada's North-Nunavut, Northwest Territories, northern Labrador and Quebec - however, there are also Inuit people living in Alberta. Approximately 1,600 people in Alberta have self-identified as Inuit although the population has been estimated at closer to 4,500. Most Inuit people in Alberta live in Edmonton and Calgary. The Inuit population is one of the fastest growing segments in Alberta with growth rates above 200 per cent in the past decade.

Other Aboriginal People and Communities

Other Aboriginal people and communities in Alberta include non-status or non-registered Indian; individuals who are registered Indians but who are not members of a First Nation; and Metis and Inuit people who may or may not affiliate with any Aboriginal organization. There are also isolated communities, cooperatives, enterprises, and other communities on provincial land.

Examples of other Aboriginal people and communities include the Aseniwuche Wewak Nation (AWN), which represents the non-status Indians who descended from Cree and Beaver tribes who traditionally lived in what is now Jasper National Park and the Rocky Mountain foothills and who now live in the Grande Cache area. There are also the Lubicon Cree; historic Mells communities

such as Jousard and Grouard; and the Mountain Cree Camp (commonly known in the past as Smallboy's Camp), which consists of First Nations people who left the Ermineskin Nation to live a traditional lifestyle in the Alberta foothills.

Aboriginal Labour Force Participation

There are interesting dynamics at play in terms of the employment picture for Aboriginal people in Alberta. Until the economic downturn in 2008, the employment rate for Aboriginal people off-reserve was getting much closer to the employment rate for the rest of Albertans. However, the economic downturn has left its mark. In April 2010, the unemployment rate for all Aboriginal people off-reserve was 17 per cent. When broken down into First Nations and Métis peoples, the rates were 24.5 per cent and 12 per cent respectively. The unemployment rate for Alberta as a province was 7.4 per cent.

For First Nations people on reserve, we heard about unemployment rates as high as 80 per cent of the population and as low as 25 per cent. We heard a similar situation for the Métis settlements. Some reserve and settlement members are having more success at employment than others but, overall, it was generally agreed that unemployment rates are much too high.

Aboriginal Albertans - Young and Growing

Alberta has one of the youngest Aboriginal populations in the country and it is growing faster than the rest of the population. Almost a third (31 per cent) of the province's Aboriginal population is under 14 years of age compared to 19 per cent for the on-Aboriginal population. Half of all Aboriginal people living in Alberta are children and youth under 24 years of age.

Section One: **What We Heard**

Over the 18 months the Committee listened and gathered input for this report, we were often told how tired Aboriginal people in Alberta are of talking about problems and issues. They told us that many of the issues are the same as they were 10, 20, and 50 years ago. The engagement was an opportunity for Aboriginal Albertans and their communities to tell us their challenges and successes and where we might work together to improve outcomes that were mutually beneficial. Aboriginal leaders and elders shared with us their visions for their people and their communities. Many voiced concern about their young people and their hope that they become a more integral part of Alberta's workforce in the future.

In the section that follows, we have outlined some of the key conversations, ideas, issues, challenges that we heard regarding barriers to employment, education, labour market training, employment programs, economic development, and community capacity. Examples of what was shared in conversations with the Committee are sprinkled throughout the report in text boxes. This section also includes what we heard during Aboriginal dialogues held in five major urban centres in the province. We have proposed 30 recommendations, which are found throughout the report. Following this section, we propose a way forward based on themes that surfaced during the engagement process.

Barriers and Challenges to Education and Employment

Throughout this engagement process, we asked everyone to share their experience, knowledge or comments about barriers and challenges to education and employment for First Nations, Metis and Inuit people in Alberta. Some people spoke about their personal experience or the experience of a family member, others spoke of what they've observed or witnessed. Some of the barriers that came up frequently included:

- » not having enough education or training for employment;
- » lack of jobs in or near some Aboriginal communities;
- dealing with racism, discrimination and negative stereotypes;
- lack of transportation to or from work for jobs outside the community or not having the money to buy a transit pass for a job in the city;
- „ not having a driver's licence for employment purposes. Many Aboriginal families may not have a car to learn to drive;
- „ quality affordable child care is difficult to find;
- „ the lack of quality, affordable housing for Aboriginal people is an ongoing issue no matter whether you live in the city, on reserves or settlements, or in smaller communities;

- » not enough social and financial supports for transitioning into educational institutions, training, apprenticeships, employment, or the workplace; and
- » personal barriers such as addictions, Fetal Alcohol Syndrome Disorder (FASO), mental health, physical disabilities, domestic abuse, or inadequate life skills.

The barriers listed above point to the complex nature of problems that can exist for some Aboriginal people in Alberta. For example, where individuals haven't had the benefit of positive parenting and role models or are dealing with addictions or abuse, they may not be ready for employment. Any combination of these barriers makes it that more difficult to pursue employment or fulfill one's potential. The barriers listed above require individual, community or societal change. Aboriginal people and communities, First Nations and Matis leaders and governments, the Government of Alberta, and all Albertans can help to alleviate or eliminate the barriers that are preventing some Aboriginal Albertans from participating in the workforce and economy.

Racism, Discrimination and Negative Stereotypes

One of the more pervasive barriers we heard about was racism and discrimination. We heard examples of discrimination against Aboriginal people by landlords, employers, individuals within government, industry, service and educational providers, human resources departments, and by citizens.

Racism against Aboriginal people happens on a daily basis in schools, workplaces, and communities and it needs to be addressed. Discrimination and negative stereotypes are damaging to individuals and to communities.

As a Committee, we saw the challenges that some communities face, but we also saw a lot of positive people and images. We saw new housing being built on several First Nations reserves that was also a source of training and employment for people and support to the local economy. We toured a new daycare on a reserve that provided a full range of child care services from infancy right up to pre-school programming. The daycare was also a source of employment for the community.

The residential school problem still lingers large and there is legitimate reason not to accept off-hand all the "benefits" associated with education.

We heard about holistic approaches to supporting women out of poverty and into trades training and permanent employment. We were impressed with the efforts of some employers to introduce Aboriginal cultural awareness in the workplace and to come up with solutions for transporting their Aboriginal workers back and forth from their communities to work. It was refreshing to hear so many positive stories to know that partnerships being made by Aboriginal people and with Aboriginal people to remove barriers and obstacles to education, training, and employment.

If Aboriginal leaders and communities and the Government of Alberta promoted more of the positive images mentioned above.

The policy in the school system of moving students ahead chronologically (social advancement through grades based on age, not achievement) does not work as some students need more time to grasp basic math and language skills.

It would help to reduce the negative stereotypes and perceptions that exist. Based on what we heard and saw, there is a disconnect between the many positive things that are happening for Aboriginal people and the persistence of old stereotypes.

Eliminating racism against Aboriginal people is a big challenge and requires the efforts of individuals, communities, governments and employers. Albertans need to be better informed and educated about Aboriginal people in Alberta. They also need to challenge unacceptable behaviour toward or negative comments about Aboriginal people.

Recommendation:

The Government of Alberta, First Nations, MSGC, MNA, and other Aboriginal communities, develop and implement strategies with other levels of government, business, industry, and organizations to eliminate racism and to increase awareness of the contributions of Aboriginal peoples, cultures and communities to Alberta.

Education

First Nation and Metis leaders, representatives of Aboriginal organizations and educational institutions spoke passionately about the challenges and barriers facing Aboriginal learners. Education is a crucial element in getting people ready for the work place but there are many Aboriginal people in Alberta who are not gaining the necessary education, skills, and training they need to successfully enter the workforce. This section and the following section on labour market training speak to the need for improving educational outcomes for Aboriginal people.

We heard about a range of issues and concerns: the high drop-out rate (low graduation rates) among Aboriginal youth; the low quality of Kindergarten to grade 12 education, especially on First Nation reserves or in rural and remote areas (which often results in the need for academic upgrading later in life); the intergenerational impact of residential schools; poorly qualified teachers; and the lack of access to education for remote and rural communities with few high schools. All of these are significant issues that can impact future employment prospects.

The mandate of the Committee focuses on education and training as it relates to preparing for the workplace, not the K-12 system. However, we realize that one depends on the other. Without a good educational foundation in elementary and secondary school, a person's chance of succeeding in post-secondary or other types of education and training programs can be severely impeded. For this reason, we want to acknowledge the concerns we heard from First Nations leaders, and others, about the quality of education on reserve.

First Nations Education on Reserve

While education is an area of provincial responsibility, First Nations education on reserve falls under federal jurisdiction. We heard from First Nation leaders their concerns about the low quality of education on reserve as well as funding disparities between provincial schools and schools on reserve. The position of the Alberta government is that First Nations students should have access to equivalent education programs and resources, whether attending school on- or off-reserve. The long-term impact of poor quality education on First Nation reserves affects all Albertans, especially when First Nations people leave their reserves to seek employment or further their education and training in other parts of the province.

We also want to acknowledge that the Government of Alberta has moved to improve the situation for all Aboriginal students. During the term of this Committee, the province announced the creation of the Education Partnership Council in October, 2009, which is a collaboration between the Government of Alberta and Alberta's First Nations, Métis and Inuit leaders. This council will guide the future direction of FNMI education in Alberta. In February 2010, an historic Memorandum of Understanding (MOU) was signed between the Government of Canada, the Government of Alberta and the Assembly of Treaty Chiefs in Alberta aimed at strengthening First Nation education in Alberta. The Committee is optimistic that these new agreements will help to address many of the concerns that were

brought to our attention. We are including a recommendation from the Committee to underscore the importance of the need for progress to be made to improve this situation.

Recommendation:

[Redacted content]

Community and Parental Involvement

Parents and communities have primary responsibility for ensuring their children are attending school and receiving an education. Aboriginal leaders, community organizations, educational institutions, and parents all told us there is work to be done in this area. They acknowledged a need to be more involved in education at the community level and to make education more culturally relevant for their children. Educators told us they want more parental involvement in decisions that affect the education of Aboriginal students.

The education system does not adequately recognize that Aboriginal learning styles and needs are different.

For various reasons, including the intergenerational impacts of residential school, many Aboriginal adults and parents have shied away from any involvement with schools, school boards, and educational institutions. This situation is changing and we are encouraged by the trend toward more community connectedness to education and the labour market - at the elementary, secondary, and post-secondary levels.

Many of Alberta's colleges, Aboriginal colleges, and post-secondary institutions are making educational inroads into Aboriginal communities. They told us what they are doing to welcome Aboriginal students and be more culturally relevant. We met with executive members of *Careers: The Next Generation*, an organization committed to supporting Aboriginal student

achievement, who explained how they work with the community and industry to provide career workshops and organize mentoring and training programs. We are also aware that the Ministry of

Advanced Education and Technology (AET) is working with FNMI communities and that it recently launched a research project entitled, *Reaching and Affecting FNMI Communities for Success in Learning*, that will explore new learning models for Aboriginal communities.

School attendance rates in some areas are too low, with students missing too much school due to lack of transportation or childcare, family issues, lack of parental involvement, or other reasons.

More involvement of Aboriginal people in education is needed in all communities throughout the province — urban, rural or remote. As we were told, the key to making positive changes will be engaging elders, elected leaders, parents, youth and adult learners to instill a value for education in all Aboriginal communities.

Recommendation:

Aboriginal communities, school boards and parents, with the help of the province where appropriate, develop and implement strategies for increased opportunities for Aboriginal families to become more involved in the education of their children.

Access to Education for all Aboriginal Albertans

A message that we heard quite often from First Nations and Metis leaders and educational institutions was that many students do not want to leave their communities to relocate for education. We heard this from parents who have to send their children to board out in the nearest town or urban centre to be able to attend high school as well as from adults who wanted to pursue post-secondary education or training but were reluctant to move to the city, especially if this meant relocating their families. While this situation isn't unique to Aboriginal people - many rural and remote families also encounter this - this conversation did bring attention to the issue of access to education and the need for choice.

Some Aboriginal communities in Alberta have a high school, college or post-secondary presence; others do not. Some individuals and families want to pursue education locally, others prefer to move to urban centres or to particular institutions. Many Aboriginal leaders told us they'd like to see more types of education and educational programs available in and for their communities, especially online and distance education, or e-learning.

Recommendation:

The Government of Alberta ensure that rural and remote Aboriginal people and communities have internet-based options for accessing education and training to prepare for employment and lifelong learning.

First Nations Colleges in Alberta

The subject of access to education was also discussed in meetings with representatives from educational institutions and training provider organizations, and during the urban Aboriginal dialogues. Members of the First Nations Adult and Higher Education Consortium (FNAHEC), which includes all of the First Nations colleges in Alberta, stressed to the Committee how important local access to education is for Aboriginal people and how the First Nations colleges fulfill this need.

In Alberta, there are eight First Nations colleges. The colleges are often located within First Nations communities or in close proximity. The student population is predominantly Aboriginal but the colleges are open to non-Aboriginal people. The primary goal of these institutions is to deliver a variety of programming to Aboriginal adult learners in a culturally relevant and supportive environment. FNAHEC strongly believes that the cultural aspect in their education programs is what contributes to success for Aboriginal students. The colleges see one of their key roles as preparing students to be able to successfully attend other post-secondary institutions.

The lack of qualified and culturally aware teachers on reserves and high teacher turnover does not provide the needed continuity, cultural awareness, and skill level required in the classroom.

First Nations colleges do not qualify for provincial (public) funding because most of them are considered not public institutions. Without a change in their designation they are unable to access public funding like other colleges in Alberta. The colleges do receive some federal funding and some provincial grant funding for program and student services enhancements. The First Nations colleges offer a variety of programming including basic education, nursing, social work and counselor training, business management, community wellness, and early childhood and youth care. They are currently seeing a real demand from Aboriginal people who require academic upgrading, workplace literacy, and basic pre-trades training.

Some of the colleges, in collaboration with Alberta's universities and Alberta Advanced Education and Technology (AET), have delivered the Aboriginal Teacher Training Program. The program is currently being delivered in partnership with the University of Alberta and Northern Lakes College. This program has led to an increase in the number of First Nations, Metis and Inuit teachers in Alberta classrooms. According to AET, the program's success has been due to the strong partnership relationship developed with the First Nations colleges and their ability to offer students the opportunity to complete their degrees while maintaining community, family, and cultural connections. The value of this type of approach, and the role of the First Nations colleges, was underscored by participants in a number of our dialogues and meetings.

Recommendation:

The Government of Alberta explore ways to maximize the effectiveness of First Nations Colleges in Alberta given their unique location, status and program focus on Aboriginal student success.

The Committee would like to note that many of Alberta's colleges and universities are making concerted efforts to provide welcoming and supportive environments for Aboriginal people. We know that most of the province's universities and many colleges have created Aboriginal student services and have developed partnerships among themselves and with communities to open the door to more input and collaboration. Access to education for Aboriginal Albertans is definitely improving. Our intent with the education-related recommendations is to open the door even further.

Labour Market Training and Employment Programs and Services

Aboriginal Training for Employment in Alberta

In Alberta, both the provincial and federal governments have a role in labour market training.

For the province, the key ministries are Employment and Immigration, and Advanced Education and Technology. For the federal government, the key departments are Human Resources and Skills Development Canada (HRSDC), Service Canada, and Indian and Northern Affairs Canada (INAC).

For the Government of Alberta, the Ministry of Employment and Immigration provides a variety of services to Albertans to support their efforts to become employed, including training programs. Each program has specific eligibility criteria. The province offers two specific programs for Aboriginal people:

- » *First Nations Training to Employment Program*, which assists First Nations people in finding and keeping meaningful employment and supports the development of partnerships between the private sector and First Nations and other Aboriginal communities/groups.
- » *Aboriginal Training to Employment Program*, which supports the development of partnerships with First Nations, Matis and other Aboriginal communities and groups to facilitate the participation of Aboriginal people in training projects.

Employment and Immigration also offers Alberta Works Income Support, which is available to eligible adults to participate in employment and training services, as well as Alberta Job Corps, which helps Albertans with the opportunity to work and earn a wage while gaining employment skills. The focus of

the Government of Alberta's employment and training programs is to help adult Albertans get the skills they need to get a job, get a better job, or increase their skills to keep their job. The Ministry of Advanced Education and Technology, which is focused on education at the college and university level, is also involved in trades training for Aboriginal people.

The federal government departments, Human Resources and Skills Development Canada (HRSDC) and Service Canada, also have a role in labour market training. The key program has been the *Aboriginal Human Resource Development Agreement Strategy (AHRDAS)*, which has been in place since 1999. The program was set up to help Aboriginal people prepare for, find, and maintain jobs. Funding is allocated to Aboriginal organizations, commonly known as AHRDA holders. There are 13 AHRDA holders in Alberta: 11 First Nation organizations, the Matis Nation of Alberta and the Metis Settlements General Council. These organizations design and deliver employment and skill development programs, and provide services that can include career counseling, job search and referral as well as interventions such as income support, training costs, and child care and travel allowance assistance.

As of April 1st the federal AHRDA program became the *Aboriginal Skills and Employment Training Strategy (ASETS)* program. It's a new 5-year program with more emphasis on demand-driven skills development, partnerships with the private sector, and across all levels of government, and accountability for improved results.

Labour Market Training, Employment Programs, and Jurisdiction

With different levels of government involved in labour market training, there are likely to be times when the rules and policies don't work for everyone. We heard concerns from First Nations leaders and representatives about First Nations people who want to participate in training but can't get the

Training has to be more closely aligned with career goals and opportunities. There is lots of training, but it is not necessarily leading to long term careers.

income support, or living allowance for shelter and food they need in order to attend training. The federal government has responsibility for on-reserve First

Nations people, which includes income support. The department of Indian and Northern Affairs (INAC), another federal department, provides a learner benefit (income support) to an eligible on-reserve First Nations person who is attending Alberta Employment and Immigration funded training. Alberta Employment and Immigration provides on-reserve First Nations members who are in training programs with tuition, mandatory fees and books. We were told these policies have worked for a lot of people, however, we also heard there are people who are falling between the cracks and not getting access to, or funding for, programs that could help them. This was especially the case for First Nations people leaving the reserve to pursue training.

As a Committee, we heard many concerns about the transition from the Aboriginal Human Resource Development Agreement Strategy (AHRDAS) program to the new Aboriginal Skills and Employment Training Strategy (ASETS) program. The AHRDA program, which falls under Human Resources and Skills Development Canada or HRSDC, was set up to help Aboriginal people prepare for, find, and maintain jobs. The program is delivered by community-based Aboriginal organizations (see box Aboriginal Training for Employment in Alberta for more detail). Discussions about labour market development programming pointed to a lack of coordination, and some duplication, between what the AHRDA holders were doing in terms of programming and services and what the provincial government is doing. There was also a perception by some First Nations and Metis leaders and representatives that the federal government may be moving toward "off-loading" labour market training programs for Aboriginal people to the province.

The recent change from the AHRDA program to the ASETS program (with greater emphasis on demand-driven skills development, partnerships with the private sector, and across all levels of government, and accountability for improved results) may be an opportunity for different levels of government to work with First Nations and Metis organizations to help Aboriginal Albertans acquire the skills and training needed to succeed in the workforce. It's also an opportunity to improve coordination and to leverage any available funding through innovative partnerships between all levels of governments, across government, and with the private and public sectors.

Recommendation:



Employment Programs and Services

During this engagement process we were fortunate to hear about a lot of good work happening with labour market training and employment programs that are helping to increase Aboriginal participation in the workforce in Alberta. As we discovered, there are numerous government-funded training and employment programs for Aboriginal people. However, we also discovered that there is a certain amount of confusion in terms of "who does what" and "what's available." We heard that in some places in the province there are no resources, while in other places there may be several service providers (First Nations, Metis or the GOA) doing the same thing.

On this note, we would suggest there may not be a need for all organizations (GOA or First Nations or Matis) to be offering similar services. There are times when government should ask itself if it is best-placed to provide a particular service,

and consider the possibility of having other groups or organizations take on that responsibility. Likewise, for First Nations and Metis organizations that exist in the same community, discussions about economies of scale, organizational strengths and weaknesses may lead to new opportunities and better service and outcomes for community members.

During the urban Aboriginal dialogues, we spoke to many service providers who serve Aboriginal people in Edmonton, Calgary, Lethbridge, Grande Prairie and Fort McMurray. They told us about the administrative burdens they believed made it difficult for them to focus on providing assistance to their clients. These burdens included issues around reporting requirements, competitive processes, timelines, uncertainty of programs, dealing with multiple funders, constant changes to funding programs including criteria, or, staff turn-over. Stakeholders expressed a sense of bewilderment when programs that, in their opinion, were achieving results, lacked the necessary financial supports to continue. They suggested that future programs provide more flexibility and be responsive to local realities, not "one size fits all."

We definitely heard a call, in both our meetings with leaders and in the urban Aboriginal dialogues, for more coordination and streamlining within the Government of Alberta but also between Aboriginal community-based service providers. Overall, we heard that services for Aboriginal people need to be more accessible to the people who are looking for help.

Recommendations:

The Government of Alberta review the array of programs and services it delivers and/or funds to support Aboriginal employment and labour market training with the goal of increasing coordination, creating efficiencies, streamlining processes and reporting requirements, and, eliminating duplication.

The Government of Alberta, First Nations, MSGC, MNAA, and other Aboriginal organizations increase collaboration to determine employment and training program needs in order to take advantage of opportunities with local industry.

Labour Market Training Programs

In terms of preparing Aboriginal people for the workforce, we heard about the need for more pre-employment training, which may include courses such as life skills,

Flexibility needs to be injected into programs so that students who have to leave for short periods of time can still complete a program. This is particularly important for Aboriginal students who may have family responsibilities or other issues that prevent them from completing programs.

the culture of work, or preparing for the trades. We heard about a gap in service in terms of career counseling, for all ages, but particularly for young Aboriginal people. And while there is a lot of emphasis on training to get people into jobs, there needs to be

more post-employment or post-training supports such as coaching, mentoring or buddy systems that help Aboriginal people who are in the workforce retain employment.

Some Aboriginal leaders and representatives told us there are training programs that are not as responsive to the needs of First Nations and Métis communities and individuals as they could be. They also raised concerns about education and training institutions in terms of high tuition fees and a lack of commitment to the outcome of the training. There was also a perception that certain institutions were unduly focused on operating as businesses and filling seats rather than providing quality training experiences that could lead to long-term employment and careers.

A specific concern brought to our attention by some institutions was "learner assessments," which are a requirement for Aboriginal people seeking eligibility for government-funded training. It was suggested that assessments be more student-focused so there was better matching between a person's career interests, skills and attributes and available training. Counseling staff at some training

institutions told us they wanted a stronger role in decision-making on government policies that applied to their students. They felt there were times when the interpretation of government policy led to unintended consequences.

Counseling staff at some educational and training institutions, who are responsible for completing learner assessments for Aboriginal students and who know their individual circumstances, felt they had the expertise to make an informed assessment and to interpret and apply government policy within the context of their community. An added benefit, we were told, could be less time involved in exchanging paperwork with government staff who may be located in a different community or urban centre. The Committee supports the idea of less

government bureaucracy (i.e. red tape) and more flexibility regarding program policy and eligibility for Aboriginal people, if the proper accountability measures are in place.

There was also concern expressed about how decisions are made in Aboriginal communities and organizations in terms of who gets approved to attend government-funded training. In addition, some communities struggle with having the capacity, expertise or tools to make an appropriate assessment. There may be room for improving the system for assessing potential learners that would also increase accountability. The Committee suggests that more discussion about learner assessment policy as it applies to Aboriginal people take place between government and educational institutions and training providers.

Recommendations:

The Government of Alberta and Aboriginal communities engage with training providers and educational institutions to improve the quality of learner assessments (i.e. abilities, skills, interests, job prospects, etc.) to ensure an optimum fit between a client's career aspirations and government-funded training opportunities.

The Government of Alberta, educational institutions, training providers, and Aboriginal communities review policies related to learner assessments and eligibility (as it relates to Aboriginal learners) with a view to increasing flexibility or creating efficiencies.

Input from Educational Institutions and Training Providers

with their qualifications or abilities; there are times when they cannot be placed into their preferred training program.

- » Training providers are concerned with program rules that require students who do not complete a program to wait for four years before they are again eligible for government sponsored training.
- ! » Increasing distance education would enable more students to get training and pursue an education.
- » Teachers need Aboriginal awareness training to maintain student interest and make education relevant.

needs and design programs and policies.

- » Provincial and federal funding programs are complex; individual learners can get caught between the two.
- » There is a failure to move Aboriginal students into post-secondary education. Ninety per cent of them are in academic upgrading. There is not enough funding or spaces for the demand.
- » Institutions have come a long way in creating a more welcoming environment for Aboriginal students.

Academic Upgrading and Literacy

An area of training that came up many times in our conversations was academic upgrading. According to the First Nations and Metis representatives we met with, as well as some education and training providers, there is a critical need for more academic upgrading for Aboriginal people. The low quality of K-12 education on some First Nation reserves and Metis settlements, and low high school completion rates for many Aboriginal people (especially youth) in the province has resulted in a significant portion of the Aboriginal population with inadequate literacy, math and computer skills. In today's knowledge economy, these essential skills are a requirement for post-secondary programs and future success in the workforce.

Academic upgrading programs are offered by most colleges, continuing education programs, and technical institutes. These programs can lead to a high school diploma or allow students to complete high school equivalency courses required for admission into a post-secondary program. The Government of Alberta, under the Employment and Training Services component of Alberta Works, may provide income support for individuals who are taking upgrading to get a job. During the Calgary urban dialogue, participants positively mentioned Bow Valley College's Aboriginal academic upgrading, which is tailored to meet the needs of Aboriginal students. They also expressed their desire for more of this type of programming and for it to be offered at other colleges or institutions.

We heard about students who can't get the academic upgrading they currently need because they have already received credits for courses taken when they were in high school. They may have been passed through their high school courses despite not having a sufficient understanding of the material. We also heard about students who received government funding to take academic upgrading but are struggling with completing their program in the amount of time set out in government policy. Some students can't get in to the program while others who are in it, can't finish. Situations such as these warrant some examination.

Recommendation:

Expand the length of time allowed for Aboriginal learners (who receive government funding for training) to complete academic upgrading if they have had a government-approved literacy assessment that identifies more time is required to be successful.

Another reason given for the increased demand for academic upgrading is limited English proficiency. For some Aboriginal students, English is not their first language and they may not have had enough exposure to develop a large vocabulary. As the Committee was told, the level of English may be adequate to achieve K-12 education, but it may not be adequate for post-secondary school. The Committee heard a request from a number of Aboriginal communities for English as a second language training. The Government of Alberta does provide some assistance in this area. We would encourage Aboriginal communities to take advantage of the programs that are available.

Recommendation:

Ensure that Aboriginal people and communities are aware that provincially-funded English-as-a-Second Language programs may be available to eligible Aboriginal learners.

The Committee cautions that academic upgrading, although extremely important given the current quality of education offered in some Aboriginal communities in the province, should be seen as an interim solution only. The overall goal must be to improve education standards and Aboriginal student achievement to the point where upgrading would no longer be necessary. Until that time, the Committee foresees a need to increase academic upgrading for Aboriginal learners in the short-term to ensure their success in the workforce in the long-term.

Labour Market Information Centres and Resources

Many First Nations and Metis people leave their homes on reserves and settlements or other rural or remote communities to seek employment in urban centres. They sometimes turn to provincially run employment centres or labour market information centers for help. However, we were told there are times when Aboriginal people are turned away from these services on the basis – or assumption – that they are receiving income support on reserve. This determination would need to be made on a case by case basis but until that is done this shouldn't preclude Aboriginal people from accessing employment-related services such as job market information, resume services, publications, or career counseling that are available to all Albertans, including Aboriginal Albertans.

Recommendation:

Employment and Immigration ensure Aboriginal people in Alberta can access provincial career counseling and employment services that are available to all Albertans

Partnering for Training

The Committee was able to meet with representatives from educational institutions, training organizations, and industry to discuss labour market training for Aboriginal people. Across the province, there are many initiatives underway, some of which have been very successful, while others have had mixed results. The success of training programs rests on many factors, but we were told that bringing the right partnerships together can make all the difference. Successful partnerships require the combined efforts of the Aboriginal community, local industry, training institutions

The success of training programs for Aboriginal people relies on many factors ... bringing the right partnerships together can make all the difference.

or providers, and government. The involvement of the Aboriginal community was very important to ensuring that local needs were part of the planning.

In Grande Prairie, we heard about the city's involvement with a national program known as the Aboriginal Workforce Participation Initiative (AWPI). The city signed an AWPI agreement in 2005 and since that time has brought together local industry, employers, three levels of government (municipal, provincial, and federal), educational

institutions and other stakeholders to explore ways to increase Aboriginal workforce participation. One of its recent AWPI initiatives included a job shadowing program for Aboriginal high school students. The program provided summer employment for 12 students that included job experience, mentoring, support with transitioning to an urban area and demystifying the college environment. The Grande Prairie AWPI representatives believed the partnership and agreement was having success but they thought they would be more successful with greater involvement of the Aboriginal communities, especially the leadership. They felt more needed to be done to build that relationship and trust.

In Southern Alberta, the Committee visited a pre-employment trades project being run by Piikani Employment Services. This project is a partnership that involves the Piikani Nation, Alberta Employment and Immigration, Indian and Northern Affairs Canada, and Community Futures Treaty Seven. The training program is providing hands-on training in the building construction field for twenty to forty trainees. Following training, participants who are employment ready will be placed with local employers. During the course of the training, up to 12 homes will be built on the Piikani Nation. These will be the first homes built on the

Nation in approximately 15 years. Piikani Nation leaders told Committee members that this partnership took time to put together but that it included elements they believed would lead to success such as cultural awareness, employment transition and placement, and three and six month follow-up for trainees.

The Committee also met with the executive of *Careers: The Next Generation*. This organization, which is a private sector initiative, has formed a network of partnerships across the province to help expose Aboriginal youth to different careers and occupations. It focuses on creating "pathways" for Aboriginal youth, which can include recruiting employers to take on students in accredited apprenticeship or internship programs.

Another training program referred to as an example of a successful partnership was the Syncrude Aboriginal Trades Preparation Project taking place in the Regional Municipality of Wood Buffalo. This program also came about as the result of a multiple partnership which included Syncrude Canada, the Government of Alberta, the Athabasca Tribal Council, Metis Nation of Alberta, individual First Nations communities, and Keyano College. The program recently had its first graduation. Something common to these partnerships, and that we heard about on more than one occasion, was that partnerships benefit the individual, but they also benefit the communities where these individuals come from.

Community Capacity and Development

The level of readiness of First Nations and Metis governments and Aboriginal organizations to carry out what needs to be done to increase labour market participation and economic development varies considerably.

We saw some very successful operations and administrations and we saw others that had almost no resources. There are many factors at play that affect community capacity including leadership, governance, funding, size of membership, geographic location, skill and education levels, and physical infrastructure.

Almost everyone we met with acknowledged capacity – at both the community and individual level – as a critical issue that needed to be addressed. Workload and capacity issues hamper First Nations and Metis administrators in their dealings with their own people, other levels of government, industry, employers, and education and training institutions. Organizations are struggling with the growing demands placed on limited and often under-resourced staff. Capacity needs range from simple requirements such as assistance with proposal-writing or data collection and input to more complex, longer-term functions such as strategic planning. Alberta Employment

First Nations share a lack of capacity. "When you see Chief and Council, you see the whole of government ... there is no civil service behind them."

Our organizations have a lack of staff capacity...we have some staff doing three jobs.

and Immigration has opened up when possible, training spots for First Nations or Métis service delivery staff to help increase their capacity. More on-the-job coaching, guidance, and mentorship through role modeling would be very beneficial.

Recommendation:

The Government of Alberta support individual and organizational capacity development for First Nations, Métis, MSGC and other Aboriginal organizations through exchange opportunities such as internships, secondments and mentoring.

Internet Connectivity

Alberta has done a great deal to bring the benefits of connectivity to remote communities in the province. Unfortunately though, there are Aboriginal people that do not have internet access and this

is hampering their abilities to access information and resources that could help them. We realize that this situation is not unique to Aboriginal communities and would encourage the Government to

continue its efforts to bring connectivity to as many areas of the province as is feasible. Improved connectivity can facilitate options and alternatives for Aboriginal Albertans such as distance learning and training closer to home, the pursuit of innovative business ideas, and social networking sites for youth looking for employment. Numerous First

It has always been known that the answer lies in training and capacity building and the biggest initiative is about doing the right things to enable Métis people to move towards self reliance.

Nation leaders told us about the success of Sunchild E-Learning and how its online distance learning programs has helped students and employees in the areas of capacity building, administration, and governance. A number of Aboriginal communities could benefit from what has been applied with success in other communities.

Recommendations:

The Government of Alberta press the federal government to expand information technology infrastructure on reserve to ensure First Nations people living on reserves in Alberta are able to access internet services for the purposes of education, training, business and economic development.

The Government of Alberta partner with MSGC, MNA, and other Aboriginal organizations to ensure Aboriginal people and their communities are able to access internet services for the purposes of education, training, business and economic development.

First Nations, MSGC, MNA, and other Aboriginal organizations pursue partnerships with other levels of government, business, industry, and training providers to provide information technology (IT) resources (i.e. hardware and software) and training to take advantage of internet connectivity.

Labour Force Data and Planning

Good labour force planning depends upon all kinds of reliable data, from economic trend analyses to industry and job projections to local labour market conditions. In the case of First Nations and Metis communities, we were told there is also a need for skills inventories to connect their members with employment and training opportunities. For example, what marketable skills do individual members have? What are the education levels? What kind of work experience do members have? What are the jobs available in and around the community? Knowing this information will help communities identify gaps that need to be addressed to help people get or create jobs. As important as skills inventories are, they are only part of what's needed. We would encourage industry to take a role in identifying and sharing what skills are required for work that is available or work that may be available in the future.

We were also told that the information currently available to First Nations and Metis Settlements covers large regional areas and does not provide local labour market information (i.e. employment prospects) within reasonable commuting distances of Aboriginal communities. While this situation does exist, we would like to share one recent development which holds hope for the future of planning, at least on First Nations reserves. For the first time, Statistics Canada's Labour Force Survey is being conducted in a First Nations community. In January, 2010, the Siksika First Nation, east of Calgary, in partnership with Human Resources and Skills Development Canada (HRSDC) and the Government of Alberta, started conducting an on-reserve household survey.

From our observations, aside from access to quality data, there are many Aboriginal communities that require database systems and the expertise to input and interpret data for workforce and community planning purposes.

Recommendation:

The Government of Alberta actively engage with First Nations, MSGC, MNAA, and other Aboriginal organizations to develop skills inventories, local level data, and labour market studies that can be used to support long-term community, workforce and economic development planning.

Aboriginal Economic Development and Entrepreneurship

At the beginning of our term, the Committee went to see some examples of best practices in economic development and entrepreneurship in Aboriginal communities. We went west to Grande Cache to meet with the Aseniwuche Winewak; where we toured a successful welding training centre that was created in partnership and with support from industry and government. We traveled north to Fort McKay First Nation (near Fort McMurray) where we saw a number of economic development initiatives including the new Creeburn Lake Lodge, which provides accommodations for oilsands workers.

Economic development is the key; not welfare.

The system of land ownership and title is taken for granted off reserve and off settlement where owning land provides a building block for wealth generation.

We went east to Whitefish Lake First Nation No. 128 on Goodfish Lake (near St. Paul) where we toured Goodfish Lake Development Corporation's very successful

drycleaning and laundry facility as well as its protective clothing and garment factory. We also traveled south to meet the Chief and Council of the Siksika Nation and

had the pleasure of visiting the impressive Blackfoot Crossing Historical Park (BCHP), site of the signing of Treaty 7. BCHP is not only a cultural, education and entertainment centre, it has been designated a national historic site of Canada.

During our travels we were able to experience the hospitality of the Sawridge Inns and Conference Centres in Fort McMurray, Slave Lake, and Edmonton. The first Sawridge Hotel was opened by the Sawridge First Nation Band in Slave Lake more than thirty years ago. The organization and its leaders continue to be at the forefront of Aboriginal economic development and self-sufficiency in western Canada.

The Committee felt fortunate to meet some of the Aboriginal people behind these businesses who were providing the leadership and vision for economic success. These visits were excellent examples of what's happening in some Aboriginal communities, but they also raised a few questions: "Why don't more Albertans know about these successful Aboriginal businesses?" and, "Why aren't there more of them?"

In many meetings, Aboriginal people and representatives from various organizations spoke about the progress being made, but they also pointed out how far there is to go. First Nations and Metis leaders spoke of their frustration and their inability to bring about the kind of economic change they want as quickly as they want. A critical part of this scenario was geographic location. For some remote or rural locations there is no industry nearby that can help to generate economic development. For others, industry is in their backyard but they do not have the capacity or authority to take advantage of it.

Some Aboriginal leaders and representatives criticized some employers for not hiring local Aboriginal people. Others reminded us that Aboriginal people contribute to local economies when shopping and using services in nearby towns and cities. In many cases, the contribution to that local economy is very significant. There seemed to be a sentiment that the contribution was often one-way.

Some First Nation leaders pointed to the amount of money spent on welfare or income support on reserve versus economic development. They questioned whether this was perpetuating an environment of welfare dependency in a time when many Aboriginal communities are trying to create economic opportunities for themselves and for their members. More than a few leaders told us that the status quo was no longer tolerable.

Economic Development on Reserves and Settlements

For First Nations reserves and Metis Settlements in Alberta, discussions about economic development are invariably tied to issues of land and home ownership, geographic location, land use, and resource development. It's a complex subject for First Nations that also touches on lack of equity, treaty rights, federal jurisdiction, consultation, and regulation. Economic development on reserve is complicated by federal jurisdiction and issues relating to land title. Several First Nations leaders shared their frustration about their inability to create commercial real estate developments on reserve.

The Government of Canada has recently taken steps to change this situation by passing legislation to facilitate the development of major commercial real estate on reserve land when requested by the band. As we understand it, this legislation would enhance the value of Aboriginal assets by addressing legislative and regulatory barriers to Aboriginal economic development. It would be optional legislation that would be available to First Nations across Canada. For the legislation to apply, a First Nation would need to have a commercial or industrial proponent, a province willing to participate, and support from the community. We would encourage our government to monitor these developments closely and to be open to cooperation in this matter.

There are several areas related to Aboriginal economic development that the Government of Alberta and the Government of Canada are both focusing on including: strengthening Aboriginal entrepreneurship, developing Aboriginal human capital, enhancing the value of Aboriginal assets, leveraging greater access to commercial capital, and increasing participation in resource development opportunities. Aboriginal economic development is ripe for new ideas, new partnerships, and a willingness from all involved to seize opportunities to do things differently.

The Government of Alberta and Aboriginal Economic Development

The Committee was told that the Government of Alberta is doing some very positive work in the area of Aboriginal economic development.

What is needed are improvements to how programs and funding are coordinated. Participants said it was confusing to know which government ministry offered what type of assistance. For example, funding for assistance or support for various types of economic development initiatives can be accessed through the ministries of Employment and Immigration, Aboriginal

The government is placing high emphasis on social programs while neglecting economic development. The focus is wrong. Take care of economic development and the rest will sort itself out.

Relatoris, Finance and Enterprise, and Agriculture. While each of these ministries serves Aboriginal people, they may be working in isolation of one another.

The level of bureaucracy and regulation in government ministries was also discouraging to some Aboriginal people and may inadvertently be shutting down potential economic development projects or aspiring entrepreneurs. Another missing piece was help with strategic long-term planning. Being able to get funding for individual projects was helpful, but it would be better if it could be part of an economic road map for their future. Too much time was being spent chasing short-term projects and dollars and not enough time was being spent setting realistic goals and long-term plans.

Recommendation:

All Government of Alberta departments that provide funding for Aboriginal economic development adopt a cross-ministry strategic approach that increases coordination, joint planning, transparency, and assessment of viable opportunities for Aboriginal communities.

As noted earlier, there is a growing entrepreneurial leadership emerging in some Aboriginal communities in Alberta. The Aboriginal business owners we met with were convinced that economic development and more entrepreneurship were the way toward greater self-reliance. The Government of Alberta supports entrepreneurship development for Aboriginal people and communities. From what we observed, there is definitely room for more entrepreneurship both large and small-scale. This is an area in which the private sector in Alberta, if willing to be innovative, can find new partners, new opportunities and new businesses with Aboriginal communities and Aboriginal entrepreneurs.

The subject of entrepreneurship often came up in relation to young Aboriginal people who had business ideas they wanted to pursue. With modern internet technology, location may not be an obstacle to operating a business from a reserve, settlement or a rural community. Another benefit is that small businesses and niche markets often lead to jobs for others. During our urban Aboriginal dialogues, it was suggested that young Aboriginal people living in cities are particularly interested in creating small businesses, but need more financial support and encouragement.

Recommendation:

First Nations, MSGC, MNAA, and other Aboriginal organizations work with all levels of government and partner organizations to create an environment for encouraging more entrepreneurial activity in Aboriginal communities across Alberta.

Input from Industry, Business, Employers

- „ Need to develop trust and relationships with Aboriginal communities. Aboriginal leadership needs to be directly involved.
- “ The lack of equity within Aboriginal communities is a huge challenge. The family home is often used as collateral in small business lending, but there is no home ownership on reserve.
- “ Government needs to be bolder and take some risks; programs should be more flexible and less bureaucratic and complex.
- „ Employers should be involved in government program development; more communication with industry is needed.
- “ Provide training together with education in Grades 9-10 and start mentoring students.
- „ Industry has developed great linkages with some colleges with training programs for Aboriginal youth that lead to employment, the difficulty is with retention and keeping people engaged.
- „ Companies most successful in hiring Aboriginal workers have kept culture in mind.
- „ Government has a role in sharing information and best practices.
- “ Success factors for increasing employment: get leaders involved and set goals that cover attraction, retention and development.

Overall, in spite of the many challenges, there was definitely interest and desire among Aboriginal communities to create economic opportunity. A number of First Nation and Métis leaders talked about partnerships they had established with industry (some longstanding and some more recent) that were benefitting everyone. The Alberta Aboriginal Capital Corporations (ACCs) were mentioned for their role as developmental lenders, business services providers, and facilitators of economic development. We were also told that the Government of Alberta has made available some helpful tools and resources. Last year's *Gathering for Success* symposium, sponsored by Alberta Aboriginal Relations, was mentioned a number of times as both educational and inspiring.

Another positive initiative that was mentioned during the Calgary Urban Aboriginal dialogue was the work under way with the Calgary Chamber of Commerce. In 2009, the Chamber released a research report¹ that identified four overarching priority actions to improve Aboriginal labour market outcomes. One of its recommendations was that businesses seeking to work with Aboriginal communities align their objectives with those of Aboriginal communities. Businesses should also consider the perspectives, interests, culture, and values of the community. Using this type of approach was echoed in other parts of the province, (particularly in the Fort McMurray region). It speaks to the importance of building effective relationships based upon mutual respect, trust and understanding so that all parties are successful.

¹ *Completing the Circle. Realities, Challenges and Strategies to Improve Aboriginal Labour Market Outcomes*, March, 2009
www.catgarychamber.com

On February 10, 2010, the Government of Alberta introduced Bill 1• the Alberta Competitiveness Act. The province is looking to work closely with industry, business leaders, and Albertans to ensure Alberta increases its competitive advantage within Canada and the global economy. Its focus on partnership may be a timely opportunity for the province and First Nations, Metis and other Aboriginal communities to come together on projects that benefit everyone. First Nations and Metis communities and organizations that are open for business and looking to partner may find the province receptive, especially in terms of encouraging innovation, productivity and the adoption of technology.

Competition for Employment

Discussions about economic development often included the subject of jobs. Until the recent economic downturn that began in 2008, Alberta's economy was booming. This unprecedented growth brought labour shortages and a demand from industry for more skilled and semi-skilled workers. One option that many employers in Alberta turned to was recruiting workers through the Temporary Foreign Worker (TFW) Program, which is administered by the federal government. As we found out, there is considerable concern from Aboriginal leaders and communities about this program.

The perception is that temporary foreign workers take job opportunities away from Aboriginal Albertans. The question that often came up was: "Why aren't employers and industry looking at Aboriginal people as a source of labour to be hired or developed?"

The concern was about lost opportunities for Aboriginal Albertans. There appears to be a lot of misinformation about the TFW program, how immigration to Alberta works, and what kinds of services are available for TFWs, immigrants and refugees.

The Government of Canada requires employers to prove that they have made every possible effort to hire Canadian citizens or permanent residents before applying for approval to hire a foreign worker. The Government of Alberta's position is likewise; that Albertans should be hired first. It's also worth noting that the TFW program is employer-driven. The employer, not the government, pays for all the costs associated with recruiting foreign workers, which may include transportation, housing, etc.

The key information that came out of our conversations with Aboriginal leaders and communities was the desire to train their people - who are Albertans - for jobs in Alberta. We know through our conversations with industry representatives that there are some longstanding partnerships with Aboriginal communities that have been successful in meeting the demand for workers. We also heard from industry that Aboriginal communities could be doing more to position themselves as an attractive source of labour. On the other hand, we also heard that some First Nations had provided training to their members only to find out or be told that industry wasn't hiring.

The province will continue to need international immigration for its workforce, but it will also need to give Aboriginal Albertans more opportunity to participate in the labour market. The Aboriginal youth population in our province is growing rapidly and they will be the workers of tomorrow. We would also strongly encourage more First Nation and Metis communities and local industry to actively seek one another out and to partner in the area of skills development. In this way, Aboriginal people throughout Alberta could more fully participate in the opportunities in the Alberta economy and workforce.

Recommendation:

Given the increasing number of temporary foreign workers employed in the province the Government of Alberta work with the Government of Canada to promote the hiring of Aboriginal people in Alberta.

Safety Certification and Accreditation

The Committee received many strong messages about the impact of safety certification requirements on First Nations and Metis governments, organizations, small businesses, and individuals. We were told that current safety certification requirements impose unnecessary burdens on small businesses and entrepreneurs and that the cost of safety training programs was becoming prohibitive. There was a general

feeling that safety training was becoming an industry unto itself and was moving away from a more "common sense" approach to what was required to work safely.

The frequency of training to get or renew "tickets" (due to the short time period safety certificates are valid) was cited as a major barrier for labour market participation and economic development for Aboriginal people. First Nations and Metis leaders told us that small Aboriginal-owned businesses could not compete with larger businesses because they could not afford the high costs of safety training for staff. The Committee is raising this issue because it came up frequently in discussions with Aboriginal leaders. However, we believe this barrier has more to do with safety standards set by industry than by government. We would like to encourage First Nations and Metis leaders and their various economic development representatives to engage industry in discussions on ways to ensure safety certification and accreditation requirements work effectively but do not disadvantage Aboriginal people. We are also asking the Government of Alberta to take a closer look at industry-imposed safety certification and standards.

Recommendation:

The Government of Alberta examine the system of standards and safety certification imposed by industry to determine if it acts as a deterrent to employment and entrepreneurship for Aboriginal people.

Urban Aboriginal Communities

Input from Urban Aboriginal Dialogues

- » It is important to focus on Aboriginal newcomers to cities, but it is also important to focus on Aboriginal people who have been living in the city for a long time.
- » Aboriginal people coming to urban centres lack familiarity with their surroundings and some do not have the required skills to cope.
- » Governments need to look at what the Aboriginal community is already doing and determine how that can be supported.
- " Multi-year funding (government and non-government) is important for effective program delivery.
- » There needs to be a continuum of care so that when individuals are finished programs there is follow up and continuing support.
- It New ways of communicating are important to improve information sharing in and for urban Aboriginal communities.
- » Aboriginal organizations are key in helping people successfully transition to and within an urban environment.
- Long-term training and retention programs are key to ensuring that Aboriginal people acquire permanent employment.

The engagement process included five urban Aboriginal dialogues, which were held in Lethbridge, Grande Prairie, Calgary, Fort McMurray, and Edmonton. The dialogues were an opportunity to hear from Aboriginal community organizations, service providers, representatives from municipal governments, economic development organizations, industry, business, employers, educational representatives, as well as local First Nations, Metis and Inuit representatives.

Almost two-thirds (63 per cent) of Aboriginal Albertans live in urban centres. According to the 2006 Census, the Aboriginal population in the Edmonton area included more than 52,000 people, which was a 27.3 per cent increase from the 2001 Census. Of that figure, approximately 22,000 were First Nations and 28,000 were Metis. The Aboriginal population for the Calgary area exceeded 26,500 people, which was a 26 per cent increase from 2001. The growth of the Aboriginal population is due to a number of factors including a higher birth rate than non-Aboriginal people, more people

identifying themselves as Aboriginal, and more people moving to the city in search of jobs and better opportunities.

There are also many Aboriginal people and families who have lived in urban centres for several generations. The city has always been their home. The urban Aboriginal community is a diverse population made up of different groups and community interests. It is not homogeneous and it varies from urban centre to urban centre. We were told that given the diversity of urban communities it can be challenging to access and engage the urban Aboriginal community in a collective way. There is no one clearly identifiable representative body that speaks to the varied interests and priorities of urban Aboriginal people.

The urban dialogues demonstrated that there are many common challenges and barriers for Aboriginal people on reserve, settlement, rural or urban areas. Many participants and stakeholders in the dialogues echoed what we heard in our meetings with First Nations and Metis leaders; that there is a need for combating negative stereotypes, for more collaboration, partnership, and strategic planning, increased flexibility in programs and funding, and more coordination between governments and service providers. Many of the recommendations found throughout this report apply to the urban Aboriginal community context as well.

Supporting Transitions

A major focal point for the urban dialogues was discussions about transitions and supports. Many Aboriginal people have to choose between staying in their community, moving to, or commuting to an urban centre to pursue education, training, or employment. The resulting

separation from the land, their culture, and the support networks of their family and extended family can make the transition difficult. For Aboriginal people for whom the city has been home all their lives, transitions within the school system, into training or postsecondary education, and into employment can present a range of challenges.

We heard that Aboriginal learners and workers need to be able to focus their energies on getting an education or employment rather than being consumed by trying to meet basic needs such as housing, childcare and transportation. They may also require supports in other areas such as life skills, parenting, wellness, literacy, job readiness, and upgrading. Transitional supports for Aboriginal people are needed on a continuum as they work toward increasing their participation in Alberta's workforce and economy. For some, support may be required as they get ready for training or education or employment. For others, support may be required once they are employed and needing a mentor, coach or a tutor who can provide one-on-one guidance and help them adapt to a new environment.

A number of participants called for a continuum of supports using a more holistic approach that would be inclusive of families, reflect community, and be culturally relevant. Others called for better communication about the resources, information, and services available in urban centres. Knowing where to go or who to call is particularly important for Aboriginal people attempting to navigate systems they are not familiar with such as the different levels of government (municipal, provincial, federal) or transportation routes around the city or the various administrative procedures involved in completing applications or accessing programs and services.

We spoke with many service providers who spoke of their experiences in providing services to their Aboriginal clients. They also talked about their concerns and needs as agencies and organizations. They had much to say about administrative burdens that took their focus away from providing assistance to Aboriginal learners and workers. These burdens included competitive processes, short timelines, uncertainty of program duration, dealing with multiple funders, constant changes to funding programs, onerous reporting criteria, lack of sustainable funding sources, and high staff turnover. Some of these concerns have been noted earlier in this report in the section on labour market

training and employment programs, but it's worth reiterating the desire to see future programming to be more coordinated between the various service providers, flexible in design, and responsive of local realities and priorities.

During the urban dialogues in Calgary and Edmonton, the Committee was able to speak with some Aboriginal youth. It was important to us to hear their perspectives. Ensuring that Alberta's growing Aboriginal youth population receive the supports they need to complete school and have success in the workplace is important for them and for the future of Alberta's workforce.

Input from Aboriginal Youth

- » Transitional mentors and advocates in schools and elsewhere would be very helpful.
- » Aboriginal youth may be more comfortable connecting with someone who is Aboriginal.
- » Most employers do not understand family in the context of Aboriginal cultural traditions and values
- » Youth aren't aware of what training programs are available to them.
- » Aboriginal youth need more real-life training – finances; how to find a job; how to juggle school and work.
- » Start support systems early, especially in the urban setting.
- » Some Aboriginal youth may not have the support of their leadership or parents; need someone committed to their development.
- » Don't make assumptions; not all Aboriginal youth want to go into the trades.
- » There is frustration with past stigmas and stereotypes.
- » Employers should not underestimate youth and keep an open mind.

The Government of Alberta, and the Ministry of Aboriginal Relations In particular, work with other governments and organizations to address the issues of urban Aboriginal people in Alberta. It is a partner with the federal government in the delivery of the Urban Aboriginal Strategy (UAS) in Edmonton, Calgary and Lethbridge. The Government of Alberta also supports projects and initiatives in other urban sites across the province through funding to Alberta Friendship Centres and other community organizations. The Ministry of Aboriginal Relations also helps to facilitate relationships between urban Aboriginal organizations and other provincial ministries.

Based on what we heard during the urban dialogues, there is willingness and opportunity for urban Aboriginal community organizations, service providers, representatives from municipal governments, economic development organizations, industry, business, employers, educational representatives, as well as local First Nations, Metis and Inuit representatives to improve the awareness and quality of services and programs for urban Aboriginal people. We encourage urban Aboriginal organizations and service providers to come together to address the urban Aboriginal communities' priorities and to put their collective energies into partnerships for making change and finding solutions that work for the communities they serve.

Recommendations:

The Province adopt ways to enhance transitional support services in major urban settings in partnership with urban Aboriginal organizations, such as Friendship Centres, and in collaboration with other levels of government.

The Province continue to support and foster urban Aboriginal partnerships and initiatives that address the employment, education and economic development priorities of urban Aboriginal communities.

Section Two: A New Way Forward

Over time, specific themes emerged in the engagement process: collaboration, coordination, community, capacity, communication, and commitment. We view these themes as both a byproduct of the engagement and as tools for how to move forward as communities and governments, individually and together. There are things that First Nations and Metis leaders, governments, communities and people need to do, and there are things that the Alberta government needs to do. We both have to do more to engage industry, business, educational institutions and training providers in creating opportunities to help Aboriginal Albertans take advantage of all that Alberta has to offer its citizens.

These themes are the foundation for how to move forward and build on the positive things that are already happening. All of the recommendations in this report align under one or more themes. We view all of the recommendations as possible, some are specific to Government, but many are achievable through the collective efforts of partnerships. Some recommendations will take more time than others; many will rely on joint action and shared responsibility with First Nations, the MNA, the MSGC and other Aboriginal communities.

Collaboration

Collaboration is key to supporting First Nations, Metis and Inuit people and communities in Alberta to gain education, training, employment and economic success. Collaboration requires relationship building and a willingness to find mutually agreeable goals and outcomes. It can also prevent governments and others from working in isolation.

When the Committee first met with First Nations and Metis leadership we sought agreement to collaborate on workforce planning. We asked if they would support their staff, who were working in areas such as human resource development, economic development, and employment training, to continue working with government staff toward increasing labour market participation and creating opportunity for economic development. In response, First Nations and Metis leaders told us how important it was for them or their staff to be "at the table." They wanted their plans to be a part of the discussion.

What also became clear as the engagement process evolved was that the best possible place to address collaborative planning – or joint planning – would be locally, where the work is done. During our engagement, a few areas in the province initiated joint planning with the creation of regional collaborative forums. These forums are a coordinating and planning tool. They have the potential to put decision making, joint planning, and mutual responsibility where it belongs – with service providers and clients at the local or community level.

The forums can bring together, by region, service providers, practitioners, or representatives, of First Nation and Métis governments, provincial departments, and (where necessary) federal or municipal government departments. The regional collaborative forum concept provides a 'table' to which local service and program delivery officials bring issues and topics affecting them. Depending on the issue being addressed, officials or representatives of other departments would also be invited to the table.

These forums could among other things:

- » give organizations a point of entry into government;
- » relieve the frustration of navigating a large bureaucracy;
- » identify and address instances of duplication or crossover services;
- » provide a place to discuss issues and ideas and plan collaboratively with people who understand local conditions;
- » leverage all available resources; and
- » foster a spirit of innovation and problem solving.

An important outcome of this process for all stakeholders would be the opportunity to build or enhance relationships. Investing in the process of collaborative workforce planning with First Nations and Métis leaders and governments and Aboriginal communities will help to inform strategic labour market planning at the provincial level.

Recommendation:

In collaboration with First Nations, MSGC, MNAA, and other Aboriginal communities, the Government of Alberta continue to support the development and implementation of community-based collaborative workforce action plans.

Coordination

The need for more coordination of programs and services for Aboriginal people was a clear message heard by the Committee. Coordination needs to happen within the Government of Alberta and across departments, but it also needs to happen with other governments (both federal and municipal) as well as within Aboriginal governments and organizations. If all of these parties came together to coordinate what's available and what needs to be done, we are convinced there would be less duplication, less frustration, more streamlining and efficiencies, and better outcomes for Aboriginal people.

Community

The engagement process confirmed for us the value placed on community in Alberta. The Government of Alberta respects that Aboriginal communities are best-placed to identify their local needs, issues and solutions. We support community-based decision making and view government's role as helping to create the conditions and putting the tools in place for communities to find what works best for them – especially in the areas of education, labour market participation and economic development.

In the visits we made to Aboriginal communities, and the time we had with Aboriginal community members we met with a number of leaders and elders. Some elders told us how self-reliance was the root of a healthy community and it was important that they regain this for themselves. They also expressed concern for the youth in their communities and how they wanted a better future for them. Some leaders talked about how they are strengthening their communities and their members with better governance and more accountability. Others told us how they also need to focus on health and well-being. More than a few times, we heard Aboriginal leaders talk about how their vision for their communities was to secure for their members the same opportunities enjoyed by all Albertans.

Capacity

To move forward on increasing employment and economic development opportunities for Aboriginal people, First Nations and Metis governments and organizations and communities need to improve their capacity to do the work that needs to be done. Capacity building is required on a number of levels: individual (developing skills and experience), community (governance and civic involvement), organizational, and technological. First Nations and Metis leaders as well as industry, education and training providers asked that the government provide assistance in this area.

Access to modern technology increases a community's capacity to grow and helps to develop community members. We have made a number of recommendations aimed at increasing capacity in Aboriginal communities through the use of internet technology with a goal of more access to education, and employment and economic development opportunities.

We view the goal to increase capacity as a shared responsibility, but we also see an opportunity for the government to show some leadership. As a government, we can help to lead the way by ensuring that qualified Aboriginal people are hired into the Alberta public service and that opportunities exist to develop capacity via internships, secondments and mentoring.

Recommendation:

The Government of Alberta develop and implement a cross-ministry employment strategy to attract, recruit and retain qualified Aboriginal people into the Alberta Public Service.

Communication

Communication is included in the way forward because it is both a challenge and an opportunity. The challenge is to increase the level of awareness of the Government of Alberta's programs, services, resources and initiatives for Aboriginal people. We believe that most people would be surprised at the extent of what is available. It was clear during the engagement process that some people we met with were aware of the various programs and resources, but there were many others who were not aware. There is an opportunity to do a better job of communicating what the government does in terms of Aboriginal programs and services, both internally across departments and externally with First Nations, Metis and other Aboriginal communities.

There is also a real need for more stories about the positive work that's happening, be it by the Government of Alberta, First Nations or Métis communities or organizations, or their partners in industry, business or education. The two ministries that lead this initiative, Employment and Immigration and Aboriginal Relations, and the two supporting ministries, Alberta Advanced Education and Technology and Alberta Education have many initiatives underway.

Recommendation:

The Government of Alberta explore ways to improve communication with First Nations, Metis and other Aboriginal communities and organizations about provincial programs and services for Aboriginal people, and to improve awareness and linkages across departments that serve Aboriginal people.

Commitment

The Government of Alberta's relationship with Aboriginal Albertans is changing. The First Nations Protocol Agreement, the MNAA Framework Agreement, and the Three-Year Conditional Grant Funding Agreement with MSGC all speak to relationships that are shaping the future for Aboriginal Albertans. We started this engagement in the spirit of the Protocol Agreement, on a government-to-government basis, to build relationships. We suggest that for real change to happen in terms of increasing workforce participation and economic development opportunities for Aboriginal people there must be ongoing political leadership, political will and a real commitment between the GOA and First Nations, the MNAA, the MSGC and other Aboriginal communities.

While our term as a committee has ended, the commitment must not end. We encourage our fellow Members of the Legislative Assembly (MLAs), if they haven't already done so, to build a relationship with the Aboriginal people and communities

in their constituencies. Likewise, we encourage First Nations and Métis leaders to take opportunities to meet with their provincial MLA, as well as municipal and federal representatives. We also encourage Aboriginal leaders, industry and educational leaders, especially those industries and institutions located in or near Aboriginal communities, to come together to look at ways to partner for jobs, skill training, and business development.

Moving forward with Aboriginal people and communities to create jobs and build economies will require multiple partnerships, collaborative planning and innovation. We ask the Government of Alberta to use the results and learnings from the FNMI Workforce Planning Initiative engagement process to create a GOA Aboriginal Workforce Action Plan. We also encourage further dialogue and engagement through the creation of new or existing mechanisms, agreements or arrangements.

Recommendations:

In keeping with the Province's commitment to a long-term workforce strategy, the Government of Alberta develop an Aboriginal Workforce Strategy, informed by the FNMI Workforce Planning Initiative and engagement process.

Further engagement regarding workforce participation and economic development continue on a government-to-government basis through new or existing mechanisms, agreements or arrangements.

The dialogue between the Government of Alberta, First Nations, MSGC, MNAA, and other Aboriginal communities, and the Government of Canada continue, with the commitment of all being that it leads to real action that makes a difference.

Conclusion

It became evident to the Committee during this engagement process that we are not the experts on what needs to be done. We know that not enough is being done and we know that we need to do things differently. We need to change what we've been doing, not because there aren't successes, but because there aren't enough successes.

What we are proposing is a way to make things happen for and with Aboriginal people, in partnership and collaboration. We will encourage government to do what it can, but we are looking to First Nations and Metis leaders and governments, other Aboriginal organizations and other levels of government to do what they can to move the recommendations to action. Collaboration means that all parties have a role to play and all parties are accountable. For many of the recommendations in this report, partnership is a prerequisite.

Increasing Aboriginal participation in Alberta's workforce and economy will require more collaboration between Aboriginal communities, and with industry, employers, education and training providers. First Nation, Metis and other Aboriginal communities need more partnerships that will result in education, training, and skill development for all Aboriginal people in Alberta. Aboriginal communities may need support to create the conditions that will bring about more economic development and employment.

There are many programs and services for Aboriginal people in Alberta, offered by a variety of government and non-government organizations, but it isn't clear that they are as coordinated and as effective as they could be. Connecting the dots between what's available and what's missing, and doing more of what works would make a real difference on many levels.

We all need to pay particular attention to developing relationships that will support young Aboriginal Albertans to be successful in school and the workplace. They are a rapidly growing population that could, if given the opportunity, help to reduce Alberta's labour shortages and to increase Alberta's productivity. This would be a mutually beneficial relationship for Aboriginal people, their communities, and our province.

From the outset of this engagement process in 2008, our intent as a Committee was to generate action. Since that time a lot of good work has happened in relation to Aboriginal workforce participation and economic development. Some of our recommendations are already underway. We are confident that continuing to work together will lead to more action and more positive outcomes for Aboriginal Albertans and Alberta.

Appendix A

Terminology

Aboriginal Peoples: is a collective name for the original people of North America and their descendants. The Canadian Constitution recognizes three groups of Aboriginal people: Indian (First Nations), Metis and Inuit. These are three distinct peoples with unique histories, languages, cultural practices, and spiritual beliefs.

Assessment: A process by which the client, or the client working together with an assessor, develops a client profile in order to make informed decisions about the most suitable programs, services, and supports required to assist the client to obtain employment.

First Nations: The term First Nations came into common usage in the 1970s to replace band or Indian, which some people found offensive (see: Indian). Despite its widespread use, there is no legal definition for this term in Canada.

First Nations People: Many people prefer to be called First Nations or First Nations People instead of Indians. The term is not a synonym for Aboriginal Peoples because it doesn't include Inuit or Metis. The term First Nations People generally applies to both Status and Non-Status Indians.

First Nation: Many bands started to replace the word band in their name with First Nation in the 1980s. It is a matter of preference by individual First Nations/bands.

Indian: The term Indian collectively describes all the Indigenous People in Canada who are not Inuit or Metis.

Indian Peoples are one of three peoples recognized as Aboriginal in the *Constitution Act* of 1982 along with Inuit and Metis. In addition, three categories apply to Indians in Canada: Status Indians, Non-Status Indians and Treaty Indians. The term Indian is considered outdated by many people.

Status Indian: A person who is registered as an Indian under the *Indian Act* and thus recognized by the federal government as an Indian and accorded the accompanying rights, benefits, and restrictions of the *Indian Act* and related policies.

Non-Status Indian: An Indian person who is not registered as an Indian under the *Indian Act*.

Treaty Indian: An Indian person whose ancestors signed a treaty with Canada.

Inuit: An Aboriginal people in Northern Canada, who traditionally lived in Nunavut, Northwest Territories, Northern Quebec and Northern Labrador. The word means "people" in the Inuit language – Inuktitut. The singular of Inuit is Inuk.

Metis: The Métis National Council defines Métis as "a person who self-identifies as Métis, is of historic Métis National Ancestry, is distinct from other Aboriginal Peoples and is accepted by the Métis Nation."

Urban Aboriginal People: Refers to First Nations, Metis and Inuit residing in urban areas. According to 2006 Census data, off-reserve Aboriginal people constitute the fastest growing segment of Canadian Society.

Metis Settlement Legislation

On November 1, 1990 the Government of Alberta proclaimed legislation that provides for a unique form of government on the Metis Settlements. Developed cooperatively by the Province of Alberta and the Alberta Federation of Metis Settlements Association, this legislation establishes the only Metis land base and the only form of legislated Metis government in Canada. It was created in an effort to accommodate Metis aspirations of securing their land base, gaining local autonomy and achieving self-sufficiency.

Metis Settlements: Eight Settlements were established by the *Metis Settlements Act (MSA)*: Buffalo Lake, East Prairie, Elizabeth, Fishing Lake, Gift Lake, Kikino, Paddle Prairie and Peavine. Each settlement is run by a five-person Council that is elected by the membership and headed by a chair selected by the Council members. The MSA also created the Metis Settlements General Council (MSGC), which is comprised of the five elected councillors from each Settlement, and four Executive Officers. The MSGC acts for the collective interests of the Settlements, owns the Settlement lands in fee-simple, and can make Policies which bind all eight Settlements, and which are gazetted in the same way as provincial regulations.

Settlement Councils can make bylaws provided that they do not contravene any provincial law or General Council Policies. Bylaws must be approved by the members of the Settlement. Settlement Councils are also responsible for determining the membership of, and land allocations within, their Settlements.

Sources:

Alberta Aboriginal Relations
govab.ca

Indian and Northern Affairs Canada
lnac.gc.ca

Alberta Employment and Immigration
govab.ca

Metis National Council
metisnation.ca

Acronyms

AE - Alberta Education
AET - Advanced Education & Technology
AHRDA - Aboriginal Human Resource
Development Agreement
AR - Aboriginal Relations
E&I - Employment & Immigration
FNAHEC - First Nations Adult & Higher
Education Consortium
FNMI - First Nations, Metis and Inuit
GOA - Government of Alberta
GOC - Government of Canada
HRSDC - Human Resources and Skills
Development Canada
NAC - Indian and Northern Affairs Canada
MSGC - Metis Settlements General Council
MNAA - Metis Nation of Alberta Association
UAS - Urban Aboriginal Strategy

Appendix B

MLA Committee Engagement Participants

MLA - COMMUNITY VISITS

Aseriwuche Winewak Nation
Fort McKay First Nation
Gitt Lake Metis Settlement
Kapawe'no First Nation
Peerless Lake Community Association; Trout Lake Community Association
Siksika Nation
Whitefish Lake No. 128 First Nation

MLA - OFFICIAL ENGAGEMENT MEETINGS

Aseriwuche Winewak Nation (AWN) - Grande Cache	Metis Settlements General Council (MSGC) - Edmonton
Athabasca Tribal Council (ATC) - Fort McMurray	Nakcowinewak Nation of Canada - Grande Cache
» Athabasca Chipewyan First Nation	Pikani Nation - Rancher Creek (Brockton)
» Chipewyan Prairie First Nation	Tall Cree First Nation (North Peace Tribal Council) - Videoconference
» Fort McKay First Nation	Stoney Nation - Martey
» Fort McMurray No. 468 First Nation	Yellowhead Tribal Council (YTC)
» Mikisew Cree First Nation	„ Alexander First Nation
Bigstone Cree Nation (BCN) - Wabasca	» Alexis Nakata Sioux Nation
Hobbema First Nations - Hobbema	„ Enoch Cree Nation #440
„ Montana First Nation	„ O'Chiese First Nation
„ Louis Bull First Nation	» Sunchild First Nation
» Samson First Nation	Tribal Chiefs Venturesh. (TCVI)
„ Ermineskin First Nation	» Beaver Lake Cree Nation
Kainai (Blood) Nation - Stand Off	» Cold Lake First Nation
KeeTasKeeNow - Edmonton	„ Frog Lake First Nation
Lesser Slave Lake Indian Regional Council (LSLIRC) - Slave Lake	» Heart Lake First Nation
Metis Nation of Alberta Association (MNAA) - Edmonton	» Kehewin Cree Nation

URBAN ABORIGINAL DIALOGUES

Calgary

Canada Safeway	YMCA Calgary Aboriginal Programs & Services
University of Calgary	
Aboriginal Friendship Centre of Calgary	Treaty 7 Management Corporation
Region 3 Metis Nation of Alberta Association	Bullhead Adult Learning Education Centre
Calgary Chamber of Commerce The Business Link	Indian Business Corporation
City of Calgary	Calgary Urban Aboriginal Initiative
Community Futures Treaty 7	Red Deer Aboriginal Employment Services
Calgary Board of Education	Cenovus Energy
Canadian Natural Resources Limited (CNRL)	Aboriginal Futures Career and Training Centre
Red Deer Native Friendship Centre	Urban Society for Aboriginal Youth (USAY)
Shell Canada Limited	Grey Eagle Casino
Spirit Staffing	Personal Support & Development Network (PSDN)
Calgary Youth Employment Office	Just Say Y.E.S. (Youth Employment and Skills)
Bow Valley College	Alberta Children and Youth Services

Edmonton

Aboriginal Youth & Family Well-Being & Education Society	City of Edmonton, City Council
Women Building Futures	Grant MacEwan Aboriginal Student Club
Nechl Training, Research & Health Promotions Institute	Employment Connections Team
Careers: The Next Generation	Apeetogosan (Metis) Development Inc.
Canadian Native Friendship Centre	City of Edmonton, Human Resource Department
River Cree Resort and Casino	City of Edmonton, Office of Diversity and Inclusion
Boyle Street Community Services	Alberta Hotel and Lodging Association
Boyle Street Education Centre	Norquest College
Peace Hills Pure Water	Alberta Women Entrepreneurs
Bissell Centre Employment Services	Alberta Health Services

MLA Committee Engagement Participants

URBAN ABORIGINAL DIALOGUES

Edmonton *continued*

Canada Safeway	Alberta Native Friendship Centres Association
Metis Settlements General Council (MSGC)	Trade Winds to Success Trailing Society
Aboriginal Women's Professional Association (AWPA)	Careers: The Next Generation
Clark Builders	Edmonton Economic Development Corporation
Children and Youth Services	Aboriginal Disabilities Society
Aboriginal Business Development Services, Business Unk	Northern Alberta Institute of Technology (NAIT) - Encana Aboriginal Student Centre
Metis Employment Services - Labour Market Development - Industry Relations	Husky Energy
Christian Labour Association of Canada (CLAC)	Boys & Girls Clubs of Edmonton
Edmonton Inuit Cultural Society	Aboriginal Learning, Edmonton Catholic Schools
Building Trades of Alberta	Employ Abilities
Metis Settlements Strategic Training Initiative Society	Peace Hills Trust
Edmonton Public Schools	Elizabeth Fry Society of Edmonton
Edmonton Urban Aboriginal Affairs Committee	Alberta Indian Investment Corporation
Bent Arrow Traditional Healing Society	Institute for the Advancement of Aboriginal Women (IAAW)
Spirit Staffing & Consulting Inc.	John Humphries Centre for Peace and Human Rights
Wicahitowin: Circle of Shared Responsibility and Stewardship	CANDO - Council for the Advancement of Native Development Officers
Edmonton Chamber of Commerce	AI-Pac
Treaty 8 First Nations of Alberta	Yenowhead Tribal College
Settlement Investment Corporation	Matis Nation of Alberta Association (MNAA)
Edmonton Marriott at River Cree Resort	Canadian Forces
First Nations Employment Connections	Aboriginal Disabilities Society

URBAN ABORIGINAL DIALOGUES *continued*

Fort McMurray

Regional Municipality of Wood Buffalo Employment and Immigration Athabasca Tribal Council Keyano College Community Careers Cooperative Youth Connections Chipewyan Prairie First Nation Northeastern Alberta Aboriginal Business Association (NAABA)	Oilsands Developers Group Suncor Energy Inc. Urban Development Institute Wood Buffalo Nexen Long Lake Project Nstawoyou Association Friendship Centre ConocoPhillips Canada Advanced Education and Technology Labour Market Development Unit, Matis Nation of Alberta
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Grande Prairie

Matis Employment Services Native Counselling Services of Alberta Western Cree Tribal Council Dar Car Developments Youth Voice Grande Prairie Regional College Children and Youth Services Metis Nation of Alberta Zone 6 Grande Prairie Friendship Centre Career Transition for Youth Employment and Immigration	Grande Prairie Regional College Matis Local 1990 Ainsworth Engineered Aquateira Utilities Inc. Independent Energy Management Mech Analytics City of Grande Prairie Northern Alberta Development Council Alberta Health Services Flint Energy Services Ltd. Talisman Energy
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Lethbridge

Aboriginal Council of Lethbridge Sik-oooh-kotoki Friendship Association Kamotaan Just Say Y.E.S. (Youth Employment and Skills) Program Miywasin Centre Red Crow Community College Opokaa'sln Early Intervention Society Lethbridge Shelter and Resource Centre Fifth on Fifth Youth Services Economic Development Lethbridge Lethbridge Chamber of Commerce Community Futures Treaty Seven	Saamis Aboriginal Training and Employment Society Piikani Employment Services City of Lethbridge Lethbridge Aboriginal Career & Employment Centre Society Local 2003 Matis Nation of Alberta Association Blood Tribe Employment and Training Blood Tribe Economic Development University of Lethbridge Lethbridge College
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INDUSTRY, BUSINESS, EDUCATION AND TRAINING PROVIDERS

Alberta Education - External Advisory Committee
Careers: The Next Generation - Executive Team
Careers: The Next Generation - Field Directors
Employment and Immigration Training Provider Advisory Committee
First Nations Adult & Higher Education Consortium (FNAHEC)
Fort McMurray Industry Roundtable (OU Sands Developers Group)
Grande Prairie Industry Roundtable (Aboriginal Workforce Participation Initiative)
Northern Alberta Aboriginal Business Association (NAABA) - Fort McMurray
Northern Lakes College - Slave Lake / Grouard (Videoconference)
Senior Academic Officers of Alberta Colleges and Technical Institutes
University of Alberta Council of Aboriginal Initiatives





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Appendix 10

Mandate Letter to Cabinet Ministers



Premier of Alberta

Office of the Premier, 307 Legislature Building, Edmonton, Alberta, Canada T5K 2R6

July 7, 2015

Colleagues,

As you know, our government is committed to renewing and improving our relationship with Indigenous peoples. We intend to work with Indigenous peoples as true partners to ensure that:

Their constitutional rights are protected;

The air, land and water that they, and all our communities, rely on is protected; and

They can build more prosperous, self-reliant and culturally strong communities.

The United Nations *Declaration on the Rights of Indigenous Peoples* speaks to Indigenous people's basic human rights, language, equality, land and their right to control their own lives. At its heart, the UN Declaration encourages all of us to celebrate and preserve Indigenous cultures and traditions and to work alongside Indigenous people to ensure they are participating in decisions that concern them.

In considering the objectives of the UN Declaration, our approach will be based on the principle that the bounty of Alberta's resources must be shared by all Albertans. Our task will be to engage directly with Indigenous people to find a common and practical understanding of how the principles of the UN Declaration can be implemented in a way that is consistent with our Constitution and with Alberta law.

I expect that the most challenging part of the discussion will be related to land and resources. Many Indigenous people in Alberta are directly employed in or indirectly benefitting from Alberta's resource-driven economy. They don't want to stop resource development, but, like all Albertans, do want to ensure the air, land and water are protected so their children and grandchildren can continue to enjoy the land. I believe there is balance to be found here, working in partnership with Indigenous people so they are able to participate in a more meaningful way, and therefore benefit from, the development of natural resources in the province and the preservation and conservation of the environment.

The UN Declaration is broad-reaching and has the potential to impact how we work with Indigenous people in a myriad of ways. This is why I am asking you now, as Cabinet Ministers, to conduct a review, including budget implications, of your Ministry's policies, programs and legislation that may require changes based on the principles of the UN Declaration. I look forward also to hearing about programs and initiatives already under way that speak to the promise of the UN Declaration.

As you move forward in this analysis, you will need to work closely with Indigenous leaders. The anticipated establishment of engagement tables with each of the three Treaty areas could be the vehicles for this engagement later in the fall. Engagement with the Matis Nation of Alberta Association and the Metis Settlements General Council must also occur. I have asked the Minister of Aboriginal Relations to coordinate your submissions and bring them forward for our consideration.

There is some truly good work already happening throughout the province that reflects some of the objectives of the UN Declaration. For example, we are working hard to help return sacred ceremonial objects from across the world to Indigenous communities in Alberta where they belong. We prohibit discrimination in employment on the basis of race or ancestry. We are introducing mandatory education for all our students in the histories and cultures of Indigenous people, including residential schools. And, Alberta is also the only province to have established Metis governments and Metis lands.

These are just a few examples of things we are doing. But there is more we can, and will, do.

I look forward to seeing the results of your review and your ideas for implementation by February 1, 2016 so we can chart a path forward together with Indigenous people on this journey of reconciliation.

Sincerely,



Rachel Notley
Premier of Alberta

Appendix 11

**National Professional Development
Certification Program:**

<http://cprapdc.ca/>

Appendix 12

Calendar Submission PBC
Indigenous Sport and Rec
Comparison Table

Killam Centre for Advanced Studies
 2-29 Triffo Hall Edmonton AB Canada T6G 2E1
 Tel: 780.492.2816 / Fax: 780.492.0692
 www.gradstudies.ualberta.ca

October 8, 2015

2016-2017 University of Alberta Calendar Graduate Program Changes: new Post-Baccalaureate Certificate in Indigenous Sport and Recreation in the Faculty of Physical Education and Recreation in partnership with the Faculty of Native Studies.

Current	Proposed
<p>205.59 Physical Education and Recreation</p> <p>205.59.7 Certificates</p> <p>[NEW]</p>	<p>205.59 Physical Education and Recreation</p> <p>205.59.7 Certificates</p> <p>205.59.7.1 The Post-Baccalaureate Certificate in Indigenous Sport and Recreation</p> <p>The Certificate in Indigenous Sport and Recreation is a Post-Baccalaureate Certificate offered in partnership between the Faculty of Native Studies and the Faculty of Physical Education and Recreation. The focus this certificate is the health and well-being of Indigenous people through sport and recreation. The intended purpose is to serve a demonstrated need in the realm of community based Indigenous sport and recreation, establish a deep understanding of the cultural context of Indigenous communities and populations and to enhance leadership in the growing field of Indigenous sport and recreation. The program will be delivered in a blended format. Specifically, the curriculum will consist of 3 courses valued at 3 credits each (9 credits total), plus participation at a mandatory, one-week, in-class (i.e. face to face) experiential learning experience. This 10 month certificate is designed around a cohort model so students will work together in this innovative, blended</p>

program that can be completed with minimal travel and little disruption to their work and family lives. The online portion of the program will use both synchronous and asynchronous teaching modalities to create interactive, dynamic, and supportive communities of learning whose members will become integral participants in this specific program researching Indigenous Peoples and Recreation best practices.

Entrance Requirements

The requirements for admission will include a baccalaureate degree along with a minimum of 2 years of professional experience. Applicants who do not hold a baccalaureate degree but have considerable relevant professional experience may also be admissible. Individuals who feel that this situation applies to them are encouraged to contact admissions to discuss their status. There will be no other routes in which admission will be granted. There will be no opportunity for a residency.

Program Requirements

The post-baccalaureate certificate will be granted upon successful completion of the three required courses: PERLS 5XX (3), PERLS 5XX (3), & PERLS 5XX (3) and attendance at the non-credit, mandatory intensive week

Justification:

New Courses:

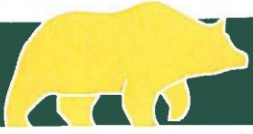
PERLS 5XX Indigeneity and Settler Colonialism (3) This course will explore and critically examine the social issues to gain an understanding of the historical and contemporary relationship between Indigenous and settler societies. Specifically, this course endeavors to investigate how Canada's brand of colonialism has impacted Indigenous collectivities both historically and today.

PERLS 5XX Managing Recreation, Sport, and Physical Activity Programs in Indigenous Communities (3) This course will examine the policies, politics, perceptions and practices related to managing recreation, sport and physical activity programs that occur in or engage indigenous communities. While a global context will be considered, the experience of Indigenous people in Canada will be central to this course. Attention will be given to applying different community and policy development theories to current issues and trends.

PERLS 5XX Indigenous Peoples' Physical Activity (3) This course will examine the role of physical activity in the lives of Indigenous peoples. While global contexts will be considered, the experiences of Indigenous peoples in Canada will be the focus of the course. The manner in which colonization continues to shape the physical activity of Indigenous peoples will be examined and frameworks for the potential promotion of physical activity will be considered.

Appendix 13

Letter to ARPA



May 21st, 2015

Dr. Craig Cameron
CPRA PDC Program Coordinator
Alberta Recreation & Parks Association
11759 Groat Road, Edmonton, AB T5M 3K6

Dear Dr. Cameron,

Re: Request for Inclusion in the CPRA Professional Development Certification

I am writing today to request, on behalf of the University of Alberta, that the Faculty of Physical Education and Recreation be considered as a recognized provider under the Canadian Parks and Recreation Association's Professional Development Certification Program.

The Faculty is developing a Graduate level certificate in Indigenous Sport and Recreation that will be offered in a blended learning format, including online instruction and a one-week, in-classroom portion that will include participation and attendance at the annual ARPA Provincial Conference. This certificate aims to increase and enhance the leadership in the field of Indigenous Sport and Recreation, through instilling a deep understanding of the context and practices present in community-based Indigenous sport and recreation.

The collaborative model between ARPA (on behalf of CPRA) and the Faculty aligns well with the intent and spirit of CPRA's Professional Development Certification initiative. I look forward to hearing from the Professional Development Committee in the near future.

Yours sincerely,

'-L_

Dr. W. Kerry Mummery, PhD, FASMF
Dean and Professor, Faculty of Physical Education and Recreation
University of Alberta, Edmonton, Alberta

OUTLINE OF ISSUE

Agenda Title: **Proposal for a (New) Post-Baccalaureate Certificate Bridging to Canadian Physical Therapy Practice, Faculty of Graduate Studies and Research and Faculty of Rehabilitation Medicine**

Motion: THAT the Board Learning and Discovery Committee, acting with delegated authority of the Board of Governors and on the recommendation of the GFC Academic Planning Committee, approve the (new) Post-Baccalaureate Certificate Bridging to Canadian Physical Therapy Practice, as proposed by the Faculty of Graduate Studies and Research and the Faculty of Rehabilitation Medicine, and as set forth in Attachment 1, for implementation in September 2016.

Item

Action Requested	<input checked="" type="checkbox"/> Approval <input type="checkbox"/> Recommendation <input type="checkbox"/> Discussion/Advice <input type="checkbox"/> Information
Proposed by	Steven Dew, Provost and Vice-President (Academic); Heather Zwicker, Interim Dean, Faculty of Graduate Studies and Research; Robert Haennel, Interim Dean, Faculty of Rehabilitation Medicine
Presenter(s)	Steven Dew, Provost and Vice-President (Academic); Bernadette Martin, Associate Dean (Strategic Initiatives), Faculty of Rehabilitation Medicine
Subject	Post Baccalaureate Certificate Bridging to Canadian Physical Therapy Practice

Details

Responsibility	Provost and Vice-President (Academic)
The Purpose of the Proposal is (please be specific)	To introduce a new Post Baccalaureate Certificate Bridging to Canadian Physical Therapy Practice through the Faculty of Rehabilitation Medicine. The students of this program are immigrants who are fully qualified as physiotherapists in their source countries who must pass the national physiotherapy competency exams in order to work as licensed physiotherapists in Canada.
The Impact of the Proposal is	There are no other Physical Therapy (PT) bridging programs in Campus Alberta. There is only one other similar program in Canada.
Replaces/Revises (eg, policies, resolutions)	Replaces/Revises the AIEPB Program into a free standing cost recovery Post Baccalaureate Certificate Bridging to Canadian Physical Therapy Practice
Timeline/Implementation Date	For implementation in September 2016
Estimated Cost	See proposed budget.
Sources of Funding	This will be a cost-recovery program.
Notes	During consideration at the GFC Academic Standards and Academic Planning Committees, it was noted that there has been a lot of interest in this program from applicants. The blended learning format and use of satellite campuses across the province have allowed students from across BC, Saskatchewan and Manitoba to participate in the pilot program alongside Alberta students. With respect to tuition costs, it was noted that students have access to the Immigrant Access Fund Canada (IAF) which provides micro loans of up to \$10,000 to internationally trained immigrants to access Canadian licensing or training to work in their profession.

Alignment/Compliance

Alignment with Guiding Documents	<i>Dare to Discover, Dare to Deliver.</i>
Compliance with Legislation,	1. Post-Secondary Learning Act (PSLA): The PSLA gives GFC

<p>Policy and/or Procedure Relevant to the Proposal (please <u>quote</u> legislation and include identifying section numbers)</p>	<p>responsibility, subject to the authority of the Board of Governors, over academic affairs. Further, the PSLA gives the Board of Governors authority over certain admission requirements and rules respecting enrolment. The Board has delegated its authority over admissions requirements and rules respecting enrolment to GFC and the GFC ASC. (Sections 26(1), 60(1)(c) and (d)).</p> <p>2. PSLA: The PSLA gives GFC responsibility, subject to the authority of the Board of Governors, over academic affairs (Section 26(1)) and provides that GFC may make recommendations to the Board of Governors on a number of matters including the budget, academic planning, and related matters (Section 26(1)(o)). GFC has thus established an Academic Planning Committee (GFC APC), as set out in the GFC APC Bylaws.</p> <p>3. UAPPOL Admissions Policy: “Admission to the University of Alberta is based on documented academic criteria established by individual Faculties and approved by GFC. This 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> <p>4. UAPPOL Admissions Procedure:</p> <p>“PROCEDURE</p> <p>1. EFFECTIVE DATE OF CHANGES TO ADMISSION REGULATIONS Following approval by GFC:</p> <p>a. Where changes to admission regulations may disadvantage students in the current admission cycle, normally implementation will be effective after the change has been published in the University Calendar for one full year (i.e., effective the second year that the information is published in the University Calendar).</p> <p>5. UAPPOL Academic Standing Policy: “All current academic standing regulations, including academic standing categories, University graduating standards and requirements for all individual programs will be those prescribed by Faculty Councils and GFC as set forth in the University Calendar.”</p> <p>6. UAPPOL Academic Standing Regulations Procedures: “All proposed new academic standing regulations and changes to existing academic standing regulations will be submitted by the Faculties or the Administration to the Provost and Vice-President (Academic). Faculties</p>
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will also submit to the Provost and Vice-President (Academic) any proposed changes to the use and/or computation of averages relating to academic standing, including promotion and graduation.

If the Provost and Vice-President (Academic) determines the proposal to be in good order, the proposal will be introduced to the appropriate University governance process(es). In considering these proposals, governance bodies will consult as necessary with the Faculties and with other individuals and offices.

Normally, changes become effective once they are approved by GFC or its delegate and are published in the University Calendar.”

7. GFC Academic Standards Committee (ASC) Terms of Reference (3. Mandate of the Committee):

“G. Certificates (All Faculties): Approval Route

GFC delegated to ASC the authority to approve proposals for the establishment of and termination of credit and non-credit certificates, regardless of the proposing academic unit. Where additional funding and/or space is required to support the offering of the proposed certificate and/or if, in the opinion of the Provost and Vice-President (Academic) (or delegate), the certificate requires Government approval, ASC would provide a recommendation on the (proposed) initiative to the GFC Academic Planning Committee (APC). (GFC 31 MAY 2005) (EXEC 12 JAN 2009)”

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

“8. Establishment/Termination of Academic Programs [...]

d. Where additional funding and/or space is required to support the offering of a proposed certificate and/or if, in the opinion of the Provost and Vice-President (Academic) the certificate required Government approval, ASC would provide a recommendation on the (proposed) initiative to APC. APC, in turn, would have the GFC delegated authority to give final approval for the proposal in those cases where Government approval of the certificate is not required; in cases where Government approval is required, APC would provide recommendation on the proposal to the Board of Governors (or delegate body). (GFC 31 MAY 2005).”

9. 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

Item No. 7

	<p>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>c. review and approve recommendations of GFC for major changes in instructional and research programs and other academic matters[.] [...]"</p> <p>Cost-recovery proposals are to be reviewed by the Registrar’s Advisory Committee on Fees (RACF), with any recommendation on the cost recovery component of the proposal to be forwarded to the Provost and Vice-President (Academic) for final approval.</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"> • Those who have been informed • Those who have been consulted • Those who are actively participating 	<p>Consultation:</p> <p>Office of the Provost and Vice-President (Academic) Kate Peters, Portfolio and Initiative Manager, and Brenda Leskiw – June 10, 2015</p> <p>Registrar’s Advisory Committee on Fees, Angelene Lavers and Thomas Hidson – June 26, 2015</p> <p>Faculty of Rehabilitation Medicine Executive Committee – September 17, 2015</p>
<p>Approval Route (Governance) (including meeting dates)</p>	<p>Faculty of Rehabilitation Medicine Council – October 6, 2015</p> <p>Registrar’s Advisory Council on Fees (RACF) (for recommendation) – October 20, 2015</p> <p>Faculty of Graduate Studies and Research Council – October 21, 2015</p> <p>GFC ASC Subcommittee on Standards (for discussion) – November 5, 2015</p> <p>GFC Academic Standards Committee – November 19, 2015</p> <p>GFC Academic Planning Committee (for recommendation) – December 9, 2015</p> <p>Board Learning and Discovery Committee (BLDC) (for approval) February 29, 2016</p>
<p>Final Approver</p>	<p>Board Learning and Discovery Committee</p>

Attachment:

1. PAPRS including Calendar changes (37 pages)

Prepared by: Colleen Britton, Co-director Administration, Alberta Internationally Educated Physiotherapists Bridging Program, cjbritto@ualberta.ca; Janice Hurlburt, Graduate Governance and Policy Coordinator, FGSR, Janice.hurlburt@ualberta.ca

Proposal Template

Diploma, Certificate and Non-credential Programs

The following template outlines the information required by Enterprise and Advanced Education to support its comprehensive review of proposals for new certificate, diploma and non-credential programs and new specializations in existing certificate, diploma and non-credential programs.

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

Basic Information

Institution	University of Alberta
Program/specialization title	Bridging to Canadian Physical Therapy Practice
Credential awarded	Post-Baccalaureate Certificate
Proposed Implementation Date	September 1, 2016

SECTION 1: PROGRAM OVERVIEW

1.1 Type of Initiative

New Certificate, Diploma or Non-credential program; or new specialization(s) in existing program.

Health Canada Grant funding for the development and implementation of the Alberta Internationally Educated Physiotherapists Bridging (AIEPB) Program project ends March 31, 2016. To sustain this successful program, we propose the creation of a cost recovery Post-Baccalaureate Certificate.

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.

Background

In 2011 the College of Physical Therapists of Alberta (CPTA), an arm of Physiotherapy Alberta College + Association (PAC+A) was awarded a five-year Health Canada Grant to develop and implement a bridging program for internationally educated physical therapists (IEPTs). The goal of the AIEPB Program project is to successfully integrate IEPTs into the healthcare workforce. CPTA oversees the project however the program has

been developed and is delivered at the University of Alberta (UofA), Department of Physical Therapy (PT). NOTE: Although referred to as the AIEPB 'Program' within the original grant application, officially there were 4 credit courses developed that have been offered to 3 cohorts of IEPTs (similar to a program delivery format).

The AIEPB Program project was planned and developed in 2011 and 2012. Based on the experience of the Ontario Internationally Educated Physiotherapists Bridging (OIEPB) Program and the UofA MSc Physical Therapy (MScPT) curriculum, it was determined that a part-time program offered using a blended format would be most suitable for Alberta IEPTs, most of whom are employed fulltime in various survival occupations. A blended format consisting of online and in-person learning activities (in either Edmonton, Calgary or Medicine Hat) including mentorship programs in the student's community addresses the fact that IEPTs are located throughout Alberta and attending a traditional in-person program would not be possible for many. The current AIEPB Program takes approximately 14 months to complete. It includes four courses: three academic and one clinical placement. The academic courses each include online self-study modules (distance format), clinical skills labs (in-person format) and weekly half-day clinical mentorship sessions (at a local PT clinical site). The first academic course starts with all students attending a 1-week Boot Camp in Edmonton. This allows the students to meet all instructors, be introduced to the technology and to complete orientation with their mentor. At the completion of Boot Camp, students essentially 'go home' to start the online work, visit their mentor's clinic and meet every second Saturday for the clinical skills lab. The clinical skills labs are held at three campuses across Alberta (see 3.4) Following completion of the academic courses, AIEPB Program students complete a 6-week fulltime, caseload carrying clinical placement. These occur at Alberta Health Services and Private Practice clinical sites which have affiliation agreements with the PT Department. All four courses are UofA credit courses so all students receive a UofA transcript including these.

Proposed Freestanding Post-Baccalaureate Certificate Program

The proposed certificate will be offered by the Faculty of Rehabilitation Medicine (FRM).

Eligibility requirements for the certificate will include the following:

1. Degree in Physical Therapy recognized by the Canadian Alliance of Physiotherapy Regulators
2. English Language Proficiency
 - a. [Test of English as a Foreign Language iBT](#) (TOEFL iBT), with a minimum score of *92/120 overall with no subtest lower than 21*
 - b. [International English Language Testing System](#) (IELTS) academic (AC) with a score of *7.0 overall and for all subtests*
 - c. All passing scores must come from one sitting of the language assessment and must be taken within two years prior to applying to the bridging program.
3. Completion of the FRM Continuing Professional Education (CPE) Physiotherapy Practice in Canada course.
4. Eligible for the Physiotherapy Competency Examination (PCE).

Applicants who meet all eligibility requirements will be invited to a competency-based Admission Assessment which assesses if an applicant's current standard of PT knowledge, clinical reasoning, PT practical skills and practice readiness is adequate for bridging. The Admission Assessment consists of four components:

1. Basic Knowledge Exam - 100 multiple choice questions
2. Objective Structured Clinical Exam – 6 basic clinical scenarios with standardized patients
3. Multiple Mini interviews – 6 stations assessing general problem-solving and communication
4. Short essay – 6 written questions assessing general writing ability and preparation for bridging

The current AIEPB Program will be restructured from four to five courses with program completion in twelve months, rather than fourteen months. The five Certificate courses will consist of two academic courses with two concurrent mentorship courses and one clinical placement course. By separating the original courses into independent but co-requisite academic and mentorship courses, it will allow for division of future streams of students into those who are pursuing Canadian licensing and those from international locations who are seeking upgrading but do not plan to work in Canada. The academic courses may also offer Canadian PTs an opportunity to update their knowledge and skills in clinical areas. Five Canadian PTs were included in one of the academic

courses in Winter term 2015 as a pilot project. They were all successful in completing the course and regaining licensure from the College of PTs of Alberta.

With certificate courses continuing to be for-credit courses, students will be eligible for student loans. Enrollment in credit courses also allows Certificate students to complete mentorship and clinical placement courses at clinical sites affiliated with the University of Alberta.

The Certificate program will be offered predominantly off-campus. The pre-requisite course, the two mentorship courses and the clinical placement course are fully off-campus. The two academic courses will be in the 3-2-3 format, with the lecture and seminar components off campus. The only on-campus time will be the lab classes, presented during 1 weekend each month.

Curriculum content includes:

- Evidence based practice
- Professional and medical ethics
- Professional Communication
 - Verbal and non-verbal skills; patient interview skills; collaborative goal setting, difficult communication;
 - Interprofessional collaboration and communication
 - Supervision and delegation
- Use of models in critical thinking and clinical reasoning
- Planning and carrying out an assessment, interpretation or assessment findings, treatment planning and intervention; use of outcome measures to evaluate interventions
- Application of clinical reasoning and differential diagnosis skills to cases covering the scope of PT practice
- Written documentation
- Written and practical exam strategies and skills
- Workplace integration
 - Job search strategies, resume and cover letter writing skills, interview skills

Program Locations

The on-campus components will be offered at the University of Alberta campus in Edmonton and a satellite campus at the University of Calgary (downtown) using synchronized distance learning technology. The on-campus components could also be offered at the PT Department satellite campuses in Camrose and Medicine Hat if enrollment in these geographic areas warranted it. Applicants will be asked to identify their site preference for on-campus components. Clinical placements will be at University of Alberta affiliated sites.

List of Courses – Appendix A

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	Year 5	Annual Ongoing
Total head count	20	22	24	24	24	24
• Full-Time Year 1	20	22	24	24	24	24
• Full-Time Year 2	0	0	0	0	0	0
• Full-Time Year 3	0	0	0	0	0	0
• Full-Time Year 4	0	0	0	0	0	0
Total FLE	0	0	0	0	0	0
• FLE Year 1	0	0	0	0	0	0
• FLE Year 2	0	0	0	0	0	0
• FLE Year 3	0	0	0	0	0	0
• FLE Year 4	0	0	0	0	0	0
Anticipated No. of Graduates	18	20	22	22	22	22

Assumptions and explanations:

The AIEPB program is part time.

The program was implemented in 2013 under Health Canada grant funding and has run three cohorts. This proposal will be a modification of the existing program by changing the number of courses from four to five and significantly increasing the program cost.

Demand for the program has increased each year. As of September 10, 2015 we have 42 serious inquiries who are aware the projected cost of this proposed certificate. We have the capacity for 24 students, though we are unsure if the increase in program cost will impact actual enrollment.

Some attrition is expected. Our 2013 – 2014 cohort was reduced from 17 to 16 students. Our 2014 – 2015 cohort was reduced from 20 to 16 students.

Minimum number of students required to create a cohort: 20

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.

For the AIEPB Health Canada funded pilot project:

Number of Applicants:
Cohort 1 (2013-2014) 38
Cohort 2 (2014-2015) 39
Cohort 3 (2015-2016) 41

Number of Admissions:
Cohort 1 (2013-2014) 18
Cohort 2 (2014-2015) 20
Cohort 3 (2015-2016) 24

Web page traffic (www.ualberta.ca/aiepb):

Landing page: 787 unique views/month
Eligibility page: 174 unique views/month
Application process page: 108 unique views/month

Phone/email inquiries: 11-15/month

The Canadian Alliance of Physiotherapy Regulators is recognizing the value in the AIEPB and OIEPB programs so is now recommending the programs to IEPTs who would benefit from the knowledge.

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.

Ensuring an adequate supply of healthcare providers including physical therapists (PTs) is important to the health and well-being of Albertans and Canadians. Over 25% of the PTs practicing in Alberta and elsewhere in Canada are over 50 years of age and expected to retire within the next 10 years.

(http://www.physiotherapyalberta.ca/everyone_else/policy_makers/information_about_physiotherapy) Canadian PT graduates are not sufficient in number to manage anticipated retirements. IEPTs are and will be an important source of PTs in Canada.

The AIEPB program commissioned the Rehabilitation Research Centre (RRC) to research and write the paper *Planning for the Alberta Physical Therapy Workforce: The Need for an Internationally Educated Physical Therapist Training Program*. RRC found that each year approximately 500 IEPTs immigrate to Canada under the Federal Skilled Worker program, with more entering under other categories (e.g. Live-in Caregiver program). In 2013 741 IEPTs applied to the Alliance for credentialing. In 2012 15.9% of the employed Alberta PTs were internationally trained.

2.3 Support

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

The AIEPB Program Advisory Committee, which meets annually is comprised of representatives from Alberta Health, Physiotherapy Alberta, Canadian Alliance of Physiotherapy Regulators, Alberta Health Services, Covenant Health, OIEPB (U of T), Immigrant Services Calgary, Immigrant Access Fund, Grant MacEwan University, Medicine Hat College, a private practice PT, an IEPT, and an AIEPB student. The Advisory committee was supportive of the AIEPB sustainability plan to move forward with this application.

1. Letters of Support Appendix C

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.

Timing of the course placements is carefully planned with the PT Department Academic Coordinator of Clinical Education (ACCE) to avoid conflict with the MScPT student placements. To date we have not had any difficulty locating mentorship or clinical placements for our students.

2.4.2 Describe the student's role in securing placements.

The AIEPB Mentorship and Clinical Placement Coordinator works with the PT Department ACCE to secure placements. Students may submit preferences for possible sites or locations but do not arrange their own placement.

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

The AIEPB Mentorship and Clinical Placement Coordinator maintains contact with the Mentors and the Clinical Instructors (supervising therapists) via email, phone, and text during mentorship and clinical placement, and makes one site visit per term to each site.

Mentors maintain contact with the AIEPB Mentorship and Clinical Placement Coordinator on a bimonthly basis to report student progress and student achievement of learning plan goals.

The Clinical Instructor, who supervises the IEPT during the 6-week clinical placement, completes a full Assessment of Clinical Performance at mid-placement and at the end of placement.

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

The University of Alberta Department of PT has Affiliation Agreements signed with various clinical sites who host MScPT students. AIEPB students are assigned to these same sites and therefore are covered by the same agreement.

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?

The AIEPB Program is innovative and was developed to align with the visions of both the University of Alberta and Campus Alberta. Each of the four cornerstones of the University's *Dare to Discover* vision (Talented People; Learning Discovery and Citizenship, Connecting Communities and Transformative Organization) and also Advanced Education and Technology's Campus Alberta vision (Albertans have the opportunity to participate in lifelong learning supported by an education system in which learning providers collaborate to deliver quality and innovative learning opportunities where and when Albertans need them to enhance their social, cultural and economic well-being.) have been considered and incorporated. Offering a blended format program delivery, which leverages the existing facilities and campuses of the FRM and the experience of FRM faculty members and clinical instructors, allows IEPTs to remain in their home communities and participate in a very high quality, learning experience. Assisting the IEPTs to enter the physiotherapy workforce, especially in areas where a shortage of clinicians exists, contributes to the overall health of the community.

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 AIEPB Program has leveraged the knowledge expertise of existing faculty and staff members in the Department of PT. The program curriculum content is similar to relevant portions of the MScPT Program but is packaged to meet the learning needs of the IEPTs. IEPTs have foundational knowledge but often need to refine their clinical reasoning, critical thinking, skills and attitudes. The AIEPB Program is planned around the MScPT schedule to minimize interference and maximize knowledge and resource leverage. Many of the online learning objects created for the AIEPB Program are also appropriate for the MScPT Program courses and are now included in the learning repository within the Department. The FRM also continues to benefit from the video-conferencing equipment purchased for the AIEPB Program.

3.3 Internal Review and Approval

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

This proposal will be reviewed by the Department of PT Department Council and the Faculty of Rehabilitation's Executive Council and Faculty Council and the Council of the Faculty of Graduate Studies and Research prior to submission to the Registrars' Office.

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.

Over the past five years, the Department of PT in the FRM at the University of Alberta has expanded its Canadian entry-level MScPT Program to include three geographically distinct campuses – Edmonton (Main/North Campus), Camrose (Augustana Campus) and Calgary (University of Calgary Downtown Centre).

A distributed learning model is used to connect the campuses for delivery of the MScPT Program. All in-person classes and labs are presented at one site, typically Edmonton, with the other campuses connecting by video-conferencing using LifeSize™, a commercial video-conferencing system. The Department of PT was able to incorporate the Edmonton and Calgary campuses within the AIEPB Program planning. Students in the first two AIEPB Program cohorts attended lab classes at either Edmonton or Calgary. The FRM Augustana Campus has not been utilized by the AIEPB Program (no local IEPTs) however a fourth FRM satellite campus has been established at the Medicine Hat College. This campus provides the on-campus components to IEPTs from southern Alberta and Saskatchewan who are in the third AIEPB cohort. Local instructors or Teaching Assistants (TA) are employed at each campus. With this flexibility, the students, who come from across Alberta and the western provinces, have less travel time to attend labs. Students have reported that this ability to attend a satellite campus for labs was central to their decision to attend the AIEPB Program. Timetabling of the AIEPB Program was done in a very deliberate way. Making use of resources during the ‘slower’ calendar months of the MScPT Program and holding labs on Saturdays has meant very little disruption between the Programs. The schedule also works for most IEPT students to carry on with their regular jobs.

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.

This AIEPB Program is unique to Alberta and western Canada. It builds on existing bridging and examination skills preparation programs in Canada and collaborates with the Ontario IEPT Bridging (OIEPB) Program offered at the University of Toronto, Department of Physical Therapy. A very collaborative working relationship between the AIEPB and OIEPB Programs has been established with ongoing sharing of resources, expertise and processes. In 2012 and 2013, an additional project to develop a Pre-Admission Assessment was undertaken. Since then, both programs have worked together to structure the same Pre-Admission Assessment for student selection which would allow some portability if an IEPT moved between Ontario and Alberta, for example. The Programs have also co-presented findings on various aspects of the Programs (Canadian Physiotherapy Association Congress 2013, Ottawa Conference Assessment in Medical and Healthcare Professional Education 2013, Canadian Physiotherapy Association Congress 2014, and World Confederation of Physical Therapy Congress 2015).

3.6 Learner Pathways

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

The first step for new IEPTs to Canada is to be credentialed with the Canadian Alliance of Physiotherapy Regulators. Once the IEPT’s professional program documentation/transcripts are reviewed and their training is deemed to be not substantially different from that in Canada, the IEPT can apply to write the written component (qualifying exam) of the Physiotherapy Competency Exam. Once they successfully pass that exam they can apply to take the clinical component (Physiotherapy National Exam). After passing the PNE clinical component, the IEPT can apply for licensure in any province.

Some applicants have not yet attempted either of the exams but recognize that they require assistance in preparing for physiotherapy practice in Canada and preparation for the exams. Some applicants have attempted the national exam(s) unsuccessfully and self-identified as requiring assistance with preparation for practice in Canada. Some applicants may be directed by the Alliance and/or their provincial regulatory body to enroll in a Bridging program before attempting or re-attempting the national exam(s).

Applicants must have completed the pre-requisite course: Physiotherapy Practice in Canada
<https://rehabilitation.ualberta.ca/professional-development/online-course-physiotherapy-practice-in-canada>

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.

The comprehensive admission assessment allows for screening for a basic level of knowledge, skill and written/verbal communication ability. Those candidates who demonstrate some gaps but have knowledge and skill levels that are deemed bridgeable will be offered admission to the Certificate. Those candidates who demonstrate significant gaps in clinical reasoning, skills and/or knowledge will be directed to remediate or pursue a Physical Therapy Assistant career pathway.

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?

Graduates of this program are generally seeking basic employment in the PT profession in Canada. A very small percentage may choose to pursue a research career path in rehabilitation.

SECTION 4: FINANCIAL VIABILITY AND SUSTAINABILITY

4.1 Annual Budget and Funding Sources

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
Revenue						
Admission Assessment Fee \$100 x 30	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000
PPIC Course (4 offerings per year x 36 Students, instruction \$1,986 deducted)	\$56,856	\$56,856	\$56,856	\$56,856	\$56,856	\$56,856
Multiple Choice Question (MCQ) Workshop (2 offerings per year [\$200] x 12 students, \$850 expenditures deducted)	\$3,950	\$3,950	\$3,950	\$3,950	\$3,950	\$3,950
Objective Structured Clinical Evaluation (OSCE) (2 offerings per year [\$425] x 12 students, \$3200 expenditures deducted)	\$7,000	\$7,000	\$7,000	\$7,000	\$7,000	\$7,000
Tuition and Related Fees (\$11,000 per)	\$220,000	\$242,000	\$264,000	\$264,000	\$264,000	\$264,000
Re-allocation from Existing Programs ¹	0	0	0	0	0	0
Other Internal Sources ²	0	0	0	0	0	0
External (Third Party) Sources ³	0	0	0	0	0	0
GOA (Identify source) ⁴	\$0	\$0	\$0	\$0	\$0	\$0
Other (specify)	\$0	\$0	\$0	\$0	\$0	\$0
Total Revenue	\$290,806	\$312,806	\$334,806	\$334,806	\$334,806	\$334,806
Operational Costs						
Salaries, Wages and Benefits	\$186,462	\$193,478	\$200,504	\$207,516	\$214,534	\$214,534
Materials and Contracted Services	\$32,116	\$33,016	\$33,314	\$33,916	\$33,916	\$33,916
Other Direct Costs	\$0	\$0	\$0	\$0	\$0	\$0
Indirect Costs	\$0	\$0	\$0	\$0	\$0	\$0
Total Operational Costs	\$218,578	\$226,494	\$234,420	\$241,432	\$248,450	\$248,450

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.*

One-time expenditures	Amount	Revenue Source	Details
Facilities	\$		
Equipment and IT	\$		
Curriculum Development	\$4,000	Rehabilitation Medicine	Curriculum will be refreshed after the 3 rd year.
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.

There are no other PT bridging programs in Campus Alberta. There is only one other similar program in Canada, the Ontario Internationally Educated Physiotherapy Bridging Program (OIEPBP), which is located at the University of Toronto (U of T). The OIEPBP curriculum is structured somewhat differently with a ten month program, with 252 hours of in-person instruction plus 320 hours of clinical internships, where the students are not U of T students and do not earn a university transcript. Tuition for OIEPBP is \$6,000. <http://www.physicaltherapy.utoronto.ca/iept/oiepb-program/courses#comprehensive>

Alberta Programs:

Nursing: Mount Royal University's Bridge to Canadian Nursing program, which is tailored very specifically to identify knowledge and skills gaps, and therefore varying in time and cost to the individual, is approximately \$4,000.

<http://mtroyal.ca/ProgramsCourses/FacultiesSchoolsCentres/HealthCommunityStudies/Programs/BridgetoCanadianNursing/CurriculumCourses/index.htm>

Dentistry: "For graduates of non-accredited dental programs, i.e. educational programs that have not been recognized by the Commission of Dental Accreditation for Canada (CDAC) or the Commission of Dental Accreditation for the United States (CODA). Successful applicants will be integrated into the third year of the regular DDS undergraduate program."

<http://www.dentistry.ualberta.ca/ProgramsAdmissions/Dentistry/DDSAdvancedPlacement.aspx> Fees for tuition for two years plus equipment and instrumentation rental is estimated at \$145,566.

Pharmacy: Bredin – Centre for Learning International Pharmacy Bridging Program runs for 41 weeks including 500 hours of structured practical training at a cost of \$14,100. <http://www.bredin.ca/international-pharmacy-bridging-program-calgary>

The Engineers and Technologists Integration Program (ETIP), through the Edmonton Mennonite Center for Newcomers, is an 11 month full time program at a cost of \$8,000. <http://emcn.ab.ca/services/career-employment-services/engineers-and-technologists-integration-program-etip/>

Non-Alberta Programs:

Pharmacy: English Bridging programs vary from 16 – 24 weeks in length and cost between \$13,500 and \$14,000. The two programs are at U of T and in BC. <http://www.pharmacistsgatewaycanada.ca/what-education-bridging.shtml>

Optometry: University of Waterloo has two programs: Bridging One (\$8,000) and Bridging Two (\$40,000). Both Bridging One and Bridging Two include classroom lectures, clinical instruction and externship rotations. Bridging Two students are also assigned to the patient clinic at the School of Optometry and Vision Science. <https://uwaterloo.ca/international-optometric-bridging-program/program-information>

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.

The students of this program are immigrants who are fully qualified as physiotherapists in their source countries. Until they pass the national physiotherapy competency exams they cannot work as licensed physiotherapists in Canada. The cost of the Physiotherapy Competency Examinations are \$865.00 for the written (MCQ) exam and \$1,455.00 for the clinical (OSCE) exam. Many of the students have tried and failed the written exam at least once prior to applying to the AIEPB program. Average PCE written exam pass rates for IEPTs who have trained in India, Philippines, South America and Middle East, who typically apply to bridging programs, are low - below 50%. (http://www.alliancept.org/credential_source_country_profiles.php) To date PCE pass rates for those who have completed the AIEPB Program and have taken the written exam are near 100% which is very promising. Pass rates for IEPTs who have completed the AIEIPB Program and have proceeded to the PNE Clinical Exam have a pass rate of 64%, again significantly higher than the pass rates without bridging.

The average length of time between arriving in Canada and attending the bridging program for the first two cohorts of students was 5 years (range 1 – 16 years). Some of the students work as Physical Therapy Assistants (PTAs), earning \$22.42 - \$27.15/hr. Others work in survival jobs earning even less. As a licensed PT, one could be earning \$37.30 - \$49.65/hr. The cost of the program outweighs the lost earning potential as a fully qualified PT. As a part time program, students can continue to work while attending. Appendix B provides a timeline depicting the advantage for IEPTs completing the AIEPB Program.

Students would be eligible to apply to for the following loans:

- Immigrant Access Fund Loans for Immigrants. Students can borrow up to \$10,000 at prime plus 1.5 % with 4 years to pay back.
- Alberta Student Aid – up to \$10,000 <http://www.studentaid.alberta.ca/before-you-apply/types-of-funding/>
- Government of Canada http://www.canlearn.ca/eng/loans_grants/loans/qualify.shtml

Students are also able to claim tuition on their Canadian income tax.

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

The program will receive funding from the Department of PT to support the transition period from the current program to a certificate. Allowing for the approval process timelines, this is expected to be 5 to 10 months.

SECTION 5: QUALITY ASSESSMENT

5.1 Institutional Capacity

5.1.1 List instructional positions that would support the proposed program, specifying position title, credential and experience requirements, and areas of expertise. Distinguish between new and existing positions; and regular and sessional appointments. Describe mechanisms (existing and planned) to develop and ensure currency of teaching skills and disciplinary expertise.

Two Contract Academic Staff: Teaching Agreement (CAST) positions will support the program.

- Certificate Coordinator: Instructor and Clinical Mentorship/Placement Coordination 1.0 FTE
- Course Coordinator/Instructor for 2 courses (Professional Physical Therapy in Canada I and II)
- These two positions currently exist. CAST position instructors have access to all teaching and learning activities available within the Faculty of Rehabilitation Medicine. There has also been a budget item included for course renewal.

5.1.2 List instructional support positions (e.g. lab technicians, tutors) related to the proposed program.

- Consultants – clinical experts as guest lecturers
- IT technical support – for operating LifeSize system; for operating B-Line at HSERC for exams
- Administrative Assistant .8 FTE

5.1.3 Describe facilities, equipment and information resources (existing and planned) that would house and support delivery of the proposed program.

The program uses existing facilities, equipment, and information resources from the Department of PT MScPT program, including the established satellite sites at the University of Calgary, and the Medicine Hat College. The AIEPB program works around the margins of the MScPT program, maximizing use of the MScPT resources while carefully minimizing interference with their program, clinical placements, and scheduling.

5.1.4 Discuss the anticipated impacts of the proposed program on student support services.

There will be no additional impacts to student support services over the existing services.

5.2 Curriculum

Describe the process of development and validation of curriculum for the proposed program. If available, please attach external review documents.

The curriculum for the original Alberta Internationally Educated Physiotherapist Bridging (AIEPB) Program was developed based on the Essential Competency Profile for Physiotherapists in Canada (Appendix D). Entry level knowledge and curriculum content in specific areas (identified gaps in the knowledge and skills of IEPTs) from the University of Alberta MScPT Program was utilized. Gaps that led to the curriculum content were identified from a variety of sources including:

- The Alliance of Physiotherapy Regulators in Canada (National licensing body responsible for credentialing IEPTs)
- The original Canadian PT bridging program at Ryerson University
- University of Toronto PT bridging program (OIEPB)
- A scan of the literature related to common gaps in internationally educated health professional from a variety of professions

Validation of the curriculum was done through consultation with the AIEPB Academic Advisor (Associate Chair of the U of A MScPT program), the OIEPB program and the Advisory Committee of the AIEPB program. For the purposes of developing this Certificate program, the original curriculum has been streamlined by removing those sections currently covered that will be included in the prerequisite course: Physiotherapy Practice in Canada. All other content from the original program has been retained.

5.3 Academic Standards

List the requirements for admission and any alternate routes to admission; for residency; for academic progression; and for graduation. Compare these requirements to those for similar programs.

Student Selection

To be eligible to apply for the AIEPB Program, the following were required. These will also apply to the certificate:

- **Degree in Physical Therapy**

Hold a degree in physical therapy from a university outside of Canada that has been assessed and recognized by the Canadian Alliance of Physiotherapy Regulators. The Alliance must verify that an applicant's educational qualifications meet Canadian standards. Applicants are asked to fill out a Verification Request Form and submit it to the Alliance at the time of application.

- **English Language Proficiency**

English language proficiency is a very important part of the application process. Since English is the language of instruction and a key requirement for professional communication in Canada all applicants must be proficient in English prior to admission.

To succeed in academic courses, applicants must meet the minimum standard described below. While the bridging program does offer skill development in professional communication, applicants who require additional language support must obtain these communication skills prior to applying to the AIEPB.

[Test of English as a Foreign Language iBT](#) (TOEFL iBT), with a minimum score of *92/120 overall with no subtest lower than 21*

[International English Language Testing System](#) (IELTS) academic (AC) with a *Score of 7.0 overall and for all subtests*

All passing scores must come from one sitting of the language assessment and must be taken within two years prior to applying to the bridging program.

Applicant Selection

A three-stage process will determine admission to the Certificate:

Stage 1: Review of Application Documents

The application and supporting documentation will be checked to determine if they are complete and match the admission requirements. Incomplete files will not be considered. Applicants with an English language proficiency score that is close to but below the minimum standard may be asked to participate in an alternative communication assessment. There are no exemptions from English language proficiency requirements.

Stage 2: Admission Competency Assessment

Qualified applicants will be invited to attend the competency-based Admission Assessment which assesses if an applicant's current standard of PT knowledge, clinical reasoning, PT practice skills and practice readiness is adequate for bridging. The assessment includes a 100 question basic knowledge exam, 6 basic clinical scenarios with a standardized patient and 6 interview stations. An Assessment Preparation Module is available to invited applicants.

Following the Admission Assessment, applicants will be advised as to what educational programming is most appropriate to their learning needs. Applicants who are assessed as not ready for bridging may be advised to complete pre-bridging activities.

Stage 3: Offer of Admission Offers of admission to the AIEPB Program will be emailed. Applicants who are offered admission complete the University of Alberta application form and submit an application fee.

These requirements and processes are the same for admission to the Ontario IPEB Program. The English language proficiency requirements match the requirements for the University of Alberta Faculty of Graduate Study and Research.

5.4 Learning Outcomes

5.4.1 Summarize the learning outcomes of the proposed program (e.g. career-specific knowledge and skills, employability skills).

By the end of the course, the student will be able to:

Learning Objective	Domain (knowledge or skill)	ECP role**	Depth of learning*
1. Explain adult learning principles and understand their application to their learning style and to self-directed and life-long learning.	K	SP	I
2. Identify and explain the three components of evidence based practice (EBP) and identify critical skills contained within the components including levels of knowledge, research and evaluation, research design and methodology	K	E, SP	E, I
3. Explain the ‘Client ’ and ‘Therapist’ perspectives of EBP, particularly culture competence and sensitivity, health promotion and determinants of health	K	E, SP, A	E, I
4. Demonstrate communication skills using a variety of strategies, including peer and self- evaluation specifically in conducting a client-centred, history-taking interview with a client and documentation in an appropriate chart format	S	Com, E	I, C
5. Read, interpret and summarize client chart information and demonstrate physical therapy documentation (e.g. databases, SOAP /DARP notes)	S	Comm, E	E,I
6. Based on the history and initial assessment, plan and perform an objective assessment and interpret the assessment findings (begin clinical reasoning)	K, S	E	E, I
7. Understand the concept of and apply ‘usual practices’ in physical therapy practice including routine infection prevention and control precautions and their application for safety of self and others	K	E, M	E,I
8. Appreciate the multiple factors (external context) that influence clinical practice of physical therapy, including regulations, environmental factors, disability and culture and demonstrate how to modify decisions and behavior appropriately	K, S	P,E,	I
9. Understand and demonstrate development of the higher order thinking skill of reflection as a tool in learning, critical thinking and clinical decision	S	SP, E	E, I

making and in developing life-long learning skills			
10. Write and use a learning plan to guide learning in the clinical setting, utilizing appropriate resources including the clinical mentor	S	SP	E,I,C
11. Identify the components of the CORE model and CORE clinical decision-making model	K	SP	E
12. Identify their personal values and codes of behaviour and compare them with the Code of Ethics of the Canadian Physiotherapy Association (CPA)	K	P	E
13. Explain the ethical principles of autonomy, beneficence, non-maleficence, veracity, confidentiality, justice and respect and apply these principles to scenarios requiring ethical decision making pertinent to physical therapy interventions	K	P	E
14. Explain the <i>International Classification of Functioning, Disability and Health (ICF)</i> and, given a scenario, identify the appropriate dimension of disablement.	K	SP, P	E
15. Plan and perform an objective assessment, interpret the assessment findings; plan and carryout an appropriate treatment (clinical reasoning process).	K, S	E	I, C
16. Based on assessment findings, select and safely apply an appropriate therapeutic exercise treatment intervention	K, S	E	I
17. Based on assessment findings, select and safely apply an appropriate electrophysical therapeutic agent intervention	K.S	E	I
18. Adapt the concepts of evidence based practice (EBP) and apply critical skills contained within the components including levels of knowledge, research and evaluation, research design and methodology	K, S	E, SP	I
19. Understand and explain the relevance of inter-professional practice, communication and health care teamwork; understand, identify and display essential components of team member functions.	K	Coll	I,E
20. Select, apply and utilize outcome measures to determine effectiveness of therapeutic exercise intervention	K, S	E	I
21. Demonstrate patient, peer (inter-professional) verbal and written communication skills specifically in assessment and treatment planning and application.	S	Com, E	I, C
22. Demonstrate consideration of the multiple factors (external context) that influence clinical practice of physical therapy, including regulations, environmental factors, disability and culture and demonstrate how to modify decisions and behavior appropriately	K, S	P,E,	I
23. Write and use a learning plan to guide learning in the clinical setting, utilizing appropriate resources including the clinical mentor	S	SP	I,C

24. Apply Clinical Reasoning skills to: a) Effectively assess (including history taking, selection of assessment techniques and application of the techniques) and document clients from variety of conditions and patient populations particularly Neuro, CR and MSK b) Provide a physical therapy differential diagnosis for clients from a variety of age groups and conditions, particularly Neuro, CR and MSK c) Select and safely apply appropriate physical therapy interventions for a variety of conditions and patient populations particularly Neuro, CR and MSK d) Evaluate the outcomes of the intervention, including using appropriate outcome measures and evidence	K, S	E	I, C
25. Adapt the concepts of evidence based practice (EBP) and apply critical skills contained within the components	K, S	E, SP	I
26. Demonstrate patient, peer (inter-professional) verbal and written communication skills specifically in assessment, treatment planning and application, and evaluation of outcomes.	S	Com, E	I, C
27. Demonstrate consideration of the multiple factors (external context) that influence clinical practice of physical therapy, including regulations, environmental factors, disability and culture including how to modify decisions and behavior appropriately	K, S	E, A, P	I, C
28. Create and use a learning plan to guide learning in the clinical setting, utilizing appropriate resources including the clinical mentor	S	SP	C
29. Explain the steps to obtaining employment in Canada including a) Seeking, interpreting and evaluating job postings b) Applying for posted jobs c) Summarizing the interview process	K	E	E, I
30. Create an appropriate professional resume accompany a job application	S	E	E, I
31. Demonstrate appropriate interview skills (preparation, communication and follow-up)	S	E	E, I
32. Write a continuing competence plan for a Professional College	S	P	E

**Essential Competency Profile for Physiotherapists in Canada Roles: Expert (E); Communicator (Com); Collaborator (Coll); Manager (M); Advocate (A); Scholarly Practitioner (SP); Professional (P)

*Depth of learning – Exposure (E); Immersion (I); Competence (C)

Key Learning Objectives for the Clinical Placement

The student is expected to build on the learning from all courses, labs and mentor placements in the AIEPB program, as well as from their basic physiotherapy education and any previous clinical experience. In addition, by the **end of REHAB 524**, and in line with the **Essential Competency Profile for Physiotherapists in Canada (2009)** they will:

1. Consistently display appropriate **Professional** behaviors, including:
 - a. Conducting themselves within legal and ethical requirements
 - b. Respecting the individuality and autonomy of their clients
 - c. Contributing to the development of the profession
2. Promote, improve and maintain the mobility, health and well-being of their clients as an **Expert** in function and mobility by:
 - a. Collecting assessment data relevant to their clients' needs and physiotherapy practice
 - b. Analyzing their assessment findings
 - c. Establishing a physiotherapy diagnosis and prognosis
 - d. Developing, implementing and evaluating the effectiveness of an intervention strategy
 - e. Managing the completion of physiotherapy services
 - f. Adjusting appropriately for range of clients' physical abilities
 - g. Adjusting Appropriately adapting to unforeseen situations
3. Through effective **Communication** develop professional relationships with clients, families, care providers and team members by:
 - a. Developing, building and maintaining rapport, trust and ethical professional relationships through effective communication
 - b. Analyzing, recording and sharing information
 - c. Take lead and present patients for whom they are responsible at team rounds
 - d. Employing effective verbal, non-verbal, written and electronic communications
4. Work **Collaboratively** and effectively to promote interprofessional practice and achieve optimal client centered care by:
 - a. Establishing and maintaining interprofessional relationships with CI and other team members which foster effective client centered collaboration
 - b. Collaborating with others to prevent, manage and resolve conflict
 - c. Recognizing the need for appropriate health professional referrals to ensure optimal client outcomes
5. **Manage** time, resources and priorities for individual practice to ensure optimal client care through:
 - a. Effective management their own practice including time management, showing initiative and preparing for their clients
 - b. Management and supervision of support personal in the provision of physical therapy services
 - c. Participating in activities that contribute to safe and effective physical therapy practice
 - d. **Carrying 80-90% of an entry level therapist's caseload and its associated responsibilities**
 - e. **Independently managing their own caseload**

6. **Advocate** for the health and well-being of clients, communities and populations as well as the promotion of the profession by:
 - a. Working collaboratively to identify and respond to the health needs of clients, population and communities.
 - b. Behaving as an ambassador for the profession of physical therapy
7. Improve client outcomes through the application, application and dissemination of best practice evidence and the **translation of knowledge** to physical therapy practice by:
 - a. Using a reflective approach to practice
 - b. Incorporating lifelong learning and experiences into best practice
 - c. Engaging in scholarly enquiry

5.4.2 Describe the consultative process with employers, industry/professional bodies or advisory groups that helped formulate these learning outcomes.

See section 5.2 on curriculum development.

5.4.3 Provide evidence of alignment/compliance with regulatory, industry, program accreditation and professional accreditation standards relevant to the program.

The learning objectives for each course are mapped to the Essential Competency Profile for Physiotherapists in Canada which is also the basis for the professional and academic Accreditation standards

5.5 Institutional Quality Assurance

5.5.1 Describe the criteria and methods for evaluating the success of the program and achieving continuous quality improvement. Include expected outcomes, key performance indicators and performance targets for the program.

The AIEPB Program Project Performance Measurement Plan follows a comprehensive logic model.

Faculty of Extension Evaluation & Research Services has been retained to conduct student, instructor, mentor and employer focus groups and surveys. Ethics approval was received by the Ethics Review Board at the University of Alberta.

Students are followed for two years to determine success in passing the national exams and in securing gainful employment as a licensed physiotherapist. (Appendix E)

5.5.2 Indicate whether a program advisory committee is planned or in place and, if so, comment on the role of the committee in program quality assurance.

The AIEPB Program Advisory Committee, which meets annually, is comprised of representatives from Alberta Health, Physiotherapy Alberta, Canadian Alliance of Physiotherapy Regulators, Alberta Health Services, Covenant Health, OIEPB (U of T), Immigrant Services Calgary, Immigrant Access Fund, Grant MacEwan University, Medicine Hat College, a private practice PT, an IEPT, and an AIEPB student.

Quality assurance for the program is driven by the program team with the support and approval of the Advisory Committee.

RECOMMENDATION (FOR DEPARTMENT USE)

Do Any Issues or Information Gaps Remain?

Recommendation(s)

Reviewer(s)

Date Completed

APPENDIX A – LIST OF COURSES

The proposed program format:

Pre-requisite Course: Online Course: Physiotherapy Practice in Canada

<http://rehabilitation.ualberta.ca/professional-development/online-course-physiotherapy-practice-in-canada>

(The Ontario Internationally Educated Physiotherapists Bridging Program online course Context of Physiotherapy Practice in Canada <http://www.physicaltherapy.utoronto.ca/iept/online-hybrid-courses/physiotherapy-practice-within-the-canadian-health-care-context> would be accepted as equivalent.)

REHAB 520 Professional Physical Therapy Practice in Canada I: *3(either term or Spring/Summer, 3-2-3 in 14 weeks) This 14 week blended format course builds on the context of the Physiotherapy Practice in Canada course. It focuses on the development of the knowledge, skills and judgment required to deliver safe and effective PT care in the Canadian setting, clinical reasoning and professional communication. Pre-requisite: Physiotherapy Practice in Canada and/or approval of the Faculty.

REHAB 521 Professional Physical Therapy Practice in Canada II: *3 (either term or Spring/Summer, 3-2-3 in 14 weeks) This 14 week blended format course consolidates skills required by a primary care PT in interpretation, diagnosis and application of assessment findings and treatment plans through the application of clinical decision making model(s), critical thinking and evidence-based practice.

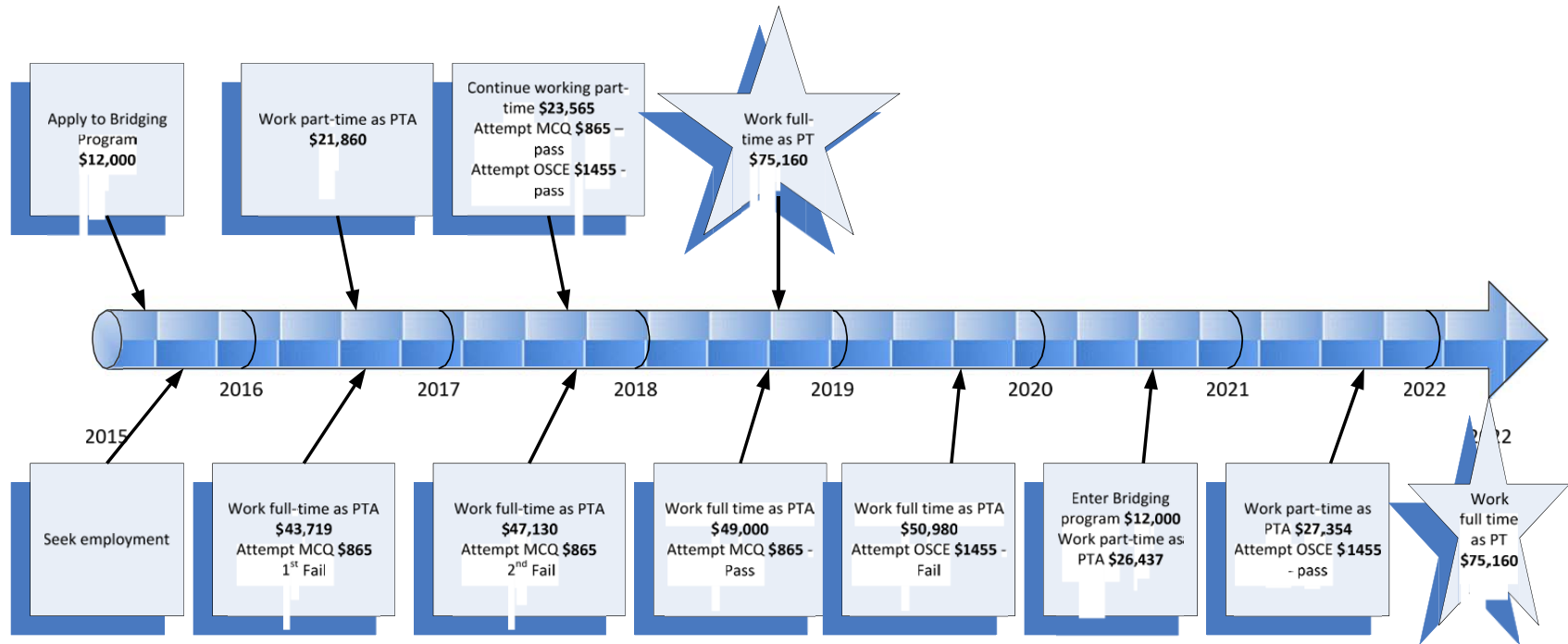
REHAB 522 Physical Therapy Mentorship Experience I *2 (either term or Spring/Summer, 40 hours) This clinical course comprises 40 hours of off campus clinical experience at a University of Alberta affiliated facility under the mentorship of a licensed physical therapist. This course applies physical therapy knowledge, skills and attitudes learned concurrently in REHAB 520 in the clinical setting. Students advance from introductory exposure through shadowing to skill demonstration within a PT practice setting. Co-requisite: REHAB 520.

REHAB 523 Physical Therapy Mentorship Experience II *2 (either term or Spring/Summer, 40 hours) This clinical course comprises 40 hours of off campus clinical experience at a University of Alberta affiliated facility under the mentorship of a licensed physical therapist. This course builds on the application of physical therapy knowledge, skills and attitudes from REHAB 522 and learned concurrently in REHAB 521. Students advance from skill demonstration to full integration and application within a PT practice setting. Pre-requisite: REHAB 522. Co-requisite: REHAB 521.

REHAB 524 Clinical Placement: * 4 (either term or Spring/Summer, 240 hours over 6 weeks) This full-time placement is completed in a University of Alberta affiliated facility and provides the clinical experience to allow for consolidation of required PT clinical knowledge, skills and attitudes. The student will be expected to independently carry an appropriate clinical caseload and demonstrate practice readiness. Pre-requisite: REHAB 522 and REHAB 523.

APPENDIX B

Advantage for Internationally Educated Physiotherapists completing the University of Alberta Bridging Program



APPENDIX C – LETTERS OF SUPPORT

March 16, 2015

Dear Madam / Sir,

RE: Letter of support for the Alberta Internationally Educated Physiotherapists Bridging (AIEPB) program to be established as a cost-recovery Free-Standing Credit Certificate at the University of Alberta (U of A)

Since 2011, the College of Physical Therapists of Alberta (CPTA) and the Faculty of Rehabilitation Medicine, Department of Physical Therapy have developed and implemented a successful Bridging Program for Internationally Educated Physical Therapists (IEPTs).

This multi-year project (2011-2016) has been funded by Health Canada through the Alberta Ministry of Health (Alberta Health) and delivered by the Department of Physical Therapy at the U of A. The original program envisioned admitting 30 IEPTs to the program into two cohorts, each completing a 14-month bridging program. The program's conceptual design is very unique, which has been expanded and enhanced with additional elements through its delivery. The program includes three academic courses and one clinical placement. It allows students to have flexibility in the pace of their studies and examinations through online self-study modules (distance format), bi-weekly clinical skills labs and weekly half-day clinical mentorship sessions (in-person format). In 2014, this program received national recognition by the International Qualification Network through the federal government.

Over the course of the first three years, the program has been expanded to include a third cohort and the total number of students is now estimated to be 60 (double the original number). 118 IEPTs applied to participate in this very popular program.

The program is entering its last year of funding from Health Canada and the interest of IEPTs for the program is steadily growing. The program's Advisory Committee has been discussing the future sustainability of AIEPB and is very supportive of the program delivery team's proposal to continue delivering AIEPB without the need for further external funding. Instead, the program would be a cost-recovery Free-Standing Credit Certificate at the Department of Physical Therapy at the U of A.

Alberta Health is supporting this proposal because of the program's success, its demand and its sustainability. The following facts provide evidence to support the proposal to maintain the bridging program for IEPTs in Alberta:

- 25% of PTs practicing in Alberta and elsewhere in Canada are over 50 years of age and are expected to retire within the next 10 years. While the number of Canadian PT

Madam / Sir

Page 2

graduates will mitigate some of this attrition, it will not be sufficient to manage expected labour gaps;

- Each year, approximately 500 IEPTs immigrate to Canada. IEPTs continue to be an important source of PTs in Canada;
- In 2013, 741 IEPTs applied to the Canadian Alliance of Physiotherapy Regulators for credentialing;
- In 2012, 16% of employed Alberta PTs were internationally trained; and,
- There is growing interest from IEPTs residing in other provinces to participate in the AIEPB program because there is no similar program offered elsewhere (except for one in Ontario).

We hope you will take the Department of Physical Therapy's request for a cost-recovery Free-Standing Credit Certificate for the AIEPB program under consideration for approval.

Should you require any additional information, please contact me at 780-415-2830.

Best regards,



Farah Jamil
A/Director, Education and Collaborative Practice
Workforce Strategy Branch
Professional Services & Health Benefits Division
Alberta Health



Canadian Alliance of Physiotherapy Regulators
Alliance canadienne des organismes de réglementation de la physiothérapie

June 1, 2015

To whom it may concern,

I am very pleased to be writing this letter of support for the Alberta Internationally Educated Physiotherapists Bridging Program (AIEPB) provided by the Department of Physical Therapy in the Faculty of Rehabilitation medicine. The Canadian Alliance of Physiotherapy Regulators (The Alliance) has been a supporting partner of the AIEPB since its inception in 2011 and serves on the AIEPB Advisory Committee.

The Alliance is the pan-Canadian federation of provincial/territorial physiotherapy regulators committed to the development and improvement of regulatory standards of practice for physiotherapists. Our members are the ten provincial regulatory Colleges for physiotherapy plus the government of Yukon. The Alliance, on behalf of most physiotherapy regulators:

- Administers the Physiotherapy Competency Examination to determine a candidate's readiness for safe, effective, and independent physiotherapy practice.
- Establishes whether the education and qualifications of internationally educated applicants are substantially equivalent to those of Canadian educated physiotherapists and
- Provides policy, research and knowledge translation services to our member regulators in support of their regulatory mandates.

Our regulatory members have delegated to The Alliance the responsibility for evaluation services of all candidates aspiring to achieve licensure and practice as a physiotherapist in Canada. This includes both Canadian-trained physiotherapists and those who were trained abroad – internationally-educated physiotherapists or IEPTs. The Alliance receives over 1000 inquiries a year from IEPTs interested in practicing as a physiotherapist in Canada. Of these 1000 inquires, on average 700-800 credentialing applications get completed annually. Once successfully credentialed, the IEPT goes on to sit the Physiotherapy Competency Exam part 1 (a written, multiple choice exam) and part 2 (a practical, clinical exam). For many years, The Alliance has expressed concern regarding the discrepancy in exam pass rates between Canadian-trained and internationally-trained physiotherapists. For example, in 2013, while 95% of Canadian-trained students passed the written exam, only 53% of IEPTs did so; similarly while 92% of Canadians passed the clinical exam, only 58% of IEPTs did so.

The Alliance Board of Directors and its Evaluation Services Committee have spent considerable time exploring possible reasons for this discrepancy in exam success rates. We have been able to identify that language proficiency and recency in practice play an important role in succeeding on the exam. Most IEPTs, however, remain out of practice for fairly long periods of time as they negotiate the immigration process and therefore lose some proficiency in practice. An in addition to language skills specifically, we have noted



Canadian Alliance of Physiotherapy Regulators

Alliance canadienne des organismes de réglementation de la physiothérapie

that communication skills and cultural awareness more broadly (not assessed by standardized language assessments such as the TOEFL) play a very important role in exam, and later practice, success. The Alberta Bridging program has done a tremendous job in addressing these issues, as well as other learning gaps frequently experienced by IEPTs. Because of its self-study distance program, the AIEPB provides access to bridging resources in a way that is easily accessible to most IEPTs in Alberta and most importantly, allows IEPTs to incorporate bridge learning with their very real needs to work to support themselves and their families.

The AIEPB has successfully enrolled 38 candidates, with 20 more expected to graduate this academic year (with a demand for the program that is twice that level). We do not yet have systematic data on outcomes, but preliminary data indicate that those IEPTs that complete bridging programs are more likely to succeed on the licensing exams than those that do not. Recreating the bridging program as a free-standing 12-month program will increase the acceptability of the program to IEPTs who would benefit from the program. Of particular importance to success on the exam, is the combination of both in-classroom and clinical setting teaching, the close mentorship program with the students, and the combination of self-study distance learning with in-classroom work. This has proved to be a powerful combination of pedagogical tools that works well for this group of learners.

Finally, completion of a “Physiotherapy in the Canadian Context” course is a mandatory requirement of our credentialing process for IEPTs. But there are not very many courses of this sort available to our candidates. Having a health care context course specific to physiotherapy, and more importantly, having it available online where candidates can access it from a variety of physical locations, is very beneficial.

To summarize, the AIEPB has been a tremendous resource to internationally-educated physiotherapists. It has created a sustainable, accessible model of bridge training, and it is an important part of the transition process for IEPTs into the Canadian practice setting. As Statistics Canada has indicated, by 2025, Canada will be fully reliant on immigration as the main source of its population growth. At the same time, fully 25% of the physiotherapists practicing in Alberta and elsewhere in Canada are over 50 years of age and are expected to retire with the next ten years while demand for physiotherapy services will increase. IEPTs are and will remain a very important source of physiotherapists for Canada, and their successful integration into the Canadian health system is essential to meet Canadian health care needs. The Alliance strongly encourages the Registrar of the University of Alberta to support this valuable program. On our part, we will continue to work with the AIEPB on its Advisory Committee, to support it through data collection and review and support it with relevant policy work completed by our Board. I greatly appreciate the opportunity to write in support of this valuable program and am happy to answer any further questions.

Yours truly,

Katya Masnyk, CEO



Physiotherapy Alberta
College + Association

February 5, 2015

**Electronic and
Regular mail**

To Whom it May Concern;

On behalf of the College of Physical Therapists of Alberta (CPTA) I am pleased to provide a letter in continued support of the Alberta Internationally Educated Bridging Program and the move to a certificate program at the University of Alberta.

CPTA has been involved in the bridging program since the program's inception in 2011 and the need for bridging programs has never been greater. The realities of an aging population and magnitude of chronic disease within our population all support an increased need for physiotherapist services in the future. The profession's demographic profile includes a large percentage of members who are likely to retire over the next 10 years resulting in a reduction in supply that cannot be managed by Canadian educated physiotherapists alone. Internationally educated physiotherapists (IEPTs) continue to be a value added resource and ensure an adequate supply of physiotherapists to meet population health needs of the future.

The education and training of IEPTs varies considerably around the world. Many are not prepared for independent practice in Canada and struggle with passing the national examination required for entry to practice. Bridging provides the education, exposure, mentorship and practice opportunities that lead to improved performance on the examination and integration into practice. Another group that benefit from components of bridging are individuals who wish to re-enter after a period away from practice. This re-entry group continues to grow in number and have very limited opportunities for re-integration beyond bridging.

Sustainability of these programs is always challenging. Moving to a certificate model provides a credible program with quality standards integral to the program. It also provides an academic record that may be used for further study which is an appealing feature and not offered by other bridging programs. The success of the candidates involved in the pilot is evidence of the quality of the program.

CPTA will continue to provide support to the program through marketing, developing regulatory policy that reinforces the value of bridging and encouraging program participation by IEPTs in Alberta.

We wish the program much success in the future and support the certificate proposal.

Yours truly,

Dianne Millette
Registrar

June 5, 2015

Colleen Britton
Co-Director, Administration
Alberta Internationally Educated Bridging Program
University of Alberta, Faculty of Rehabilitation Medicine, Department of Physical Therapy
Email: cjbritto@ualberta.ca

Dear Colleen:

Re: Support of Alberta Internationally Physiotherapists Bridging Program

Alberta Health Services would like to extend a message of support for the Alberta Internationally Educated Bridging Program (AIEBP) and its transition from a Health Canada funded project to a free standing cost recovery certificate program.

Physiotherapy is considered a difficult to recruit to profession within Alberta Health Services. The AIEBP prepares internationally educated, credentialed physiotherapists to complete their requirements to work as physiotherapists in Alberta. Six graduates of this program are currently employed as physiotherapists within our organization.

The education and training of IEPTs varies considerably around the world. Bridging provides the education, exposure, mentorship and practice opportunities that lead to improved performance on the examination and integration into practice. Another group that benefit from components of bridging are physiotherapists who wish to re-enter after a period away from practice. This re-entry group continues to grow in number and have very limited opportunities for re-integration beyond bridging.

Sustainability of these programs is always challenging. Moving to a certificate model provides a credible program with quality standards integral to the program. It also provides an academic record that may be used for further study which is an appealing feature and not offered by other bridging programs. The success of the candidates involved in the pilot is evidence of the quality of the program. AHS looks forward to the continuance of this bridging program to optimize the practice performance of internationally educated physiotherapists within the Alberta context.

Sincerely,



Linda Dempster
Vice President, Collaborative Practice, Nursing & Health Professions
Alberta Health Services

cc: Elaine Finseth, Executive Director, Interprofessional Practice
June Norris, Senior Practice Lead- Physiotherapy



12th Floor, 910 – 7 Avenue S.W.
Calgary Alberta, Canada T2P 3N8

Tel: 403.265.1120
Fax: 403.266.2486

www.immigrantservicescalgary.ca

February 6th 2015

The Registrar,
Registrar's Office,
University of Alberta
Edmonton.

It is my pleasure to write this letter of support commending the activities of the Alberta Internationally Educated Physiotherapists Bridging Program currently being offered by the Department of Physical therapy, Faculty of Rehabilitation Medicine, University of Alberta.

Immigrant Services Calgary has been associated with this program since the early days of its inception in 2013. It's been a wonderful collaborative relationship based on which new immigrants who are Internationally Trained Physiotherapists, arriving at our agency are empowered with information about the bridging program and are referred to the program as a great step in restarting their career in Canada.

As a pioneering settlement agency in the city of Calgary we serve thousands of immigrants. With the demand for Physiotherapists on the rise and keeping in mind that a significant number of practicing Physiotherapists would be retiring soon, I see tremendous potential for the sustenance of the bridging program in the career integration of newly arrived IEPT's and those poised to arrive.

On behalf of Immigrant Services Calgary I am pleased to offer our support to establish the AIEPB as a cost-recovery Free-Standing Credit Certificate.

Wishing good luck and great success to the AIEPB.

Kind regards,

Shiraz Amiry

ILVARC Director,
Immigrant Services Calgary

APPENDIX D – Essential Competency Profile for Physiotherapists in Canada

INTRODUCTION

This Quick Reference to the *Essential Competency Profile for Physiotherapists in Canada, October 2009* (the Profile) is intended to provide an overview of the essential competencies (i.e., the knowledge, skills and attitudes) required by physiotherapists in Canada at the beginning of and throughout their career.

The Profile is intended for use by academics, accreditation bodies, professional associations, regulators and individual practitioners. For enabling competencies that further describe the key competencies provided here, please consult the complete Profile document.

The central physiotherapist role of Expert integrates the other six roles for physiotherapists to practice safely and effectively regardless of their context of practice.

The overarching assumptions that apply to the competencies are that:

- i. Physiotherapists practice client-centred care and only act with the client's informed consent,
- ii. Physiotherapy practice is evidence informed, and
- iii. Client safety is paramount.

PHYSIOTHERAPIST ROLES

EXPERT

As experts in function and mobility, physiotherapists integrate all of the Physiotherapist Roles to lead in the promotion, improvement, and maintenance of the mobility, health, and well-being of Canadians.

COMMUNICATOR

Physiotherapists use effective communication to develop professional relationships with clients, families, care providers, and other stakeholders.

COLLABORATOR

Physiotherapists work collaboratively and effectively to promote interprofessional practice and achieve optimal client care.

MANAGER

Physiotherapists manage time, resources, and priorities at all levels for individual practice and to ensure sustainable physiotherapy practice overall.

ADVOCATE

Physiotherapists responsibly use their knowledge and expertise to promote the health and well-being of individual clients, communities, populations and the profession.

SCHOLARLY PRACTITIONER

Physiotherapists are committed to ongoing learning for the purpose of improving client outcomes through seeking, creating, applying, disseminating, and translating knowledge to physiotherapy practice.

PROFESSIONAL

Physiotherapists are committed to the best interests of clients and society through ethical practice, support of profession-led regulation, and high personal standards of behaviour.

KEY COMPETENCIES

EXPERT

Conventions, and associated outcomes.

COMMUNICATOR

- 2.1 Develops, builds, and maintains rapport, trust, and ethical professional relationships through effective communication.
- 2.2 Elicits, analyzes, records, applies, conveys and shares information.
- 2.3 Employs effective and appropriate verbal, non-verbal, written, and electronic communications.

COLLABORATOR

- 3.1 Establishes and maintains interprofessional relationships, which foster effective client-centered collaboration.
- 3.2 Collaborates with others to prevent, manage and resolve conflict.

MANAGER

- 4.1 Manages individual practice effectively.
- 4.2 Manages and supervises personnel involved in the delivery of physiotherapy services.
- 4.3 Participates in activities that contribute to safe and effective physiotherapy practice.

ADVOCATE

- 5.1 Works collaboratively to identify, respond to and promote the health needs and concerns of individual clients, populations, and communities.

SCHOLARLY PRACTITIONER

- 6.1 Uses a reflective approach to practice.
- 6.2 Incorporates lifelong learning and experiences into best practice.
- 6.3 Engages in scholarly inquiry.

PROFESSIONAL

- 7.1 Conducts self within legal/ethical requirements.
- 7.2 Respects the individuality and autonomy of the client.
- 7.3 Contributes to the development of the physiotherapy profession.

Appendix E – AIEPB Program Outcomes to September 2015

IEPT and Canadian Re-entry Student Performance in AIEPB Program

		Cohort 1	Cohort 2	Cohort 3	Total
AIEPB students	Number of applicants	38	39	41	118
	Number admitted	17	20	24	61
	Number commuting from out of province	1 - BC	0	3 – BC, SK, MB	4
	Number who completed the program	16	16	In progress	32
	Number who successfully completed	14	16	In progress	30
Re-entry pilot for Canadian trained PTs	Students admitted to PTher 430	-	5	Starts Jan 2016	5
	Students successfully completed PTher 430	-	5	-	5
	Students licensed and working in Alberta	-	5	-	5

Canadian Alliance of Physiotherapy Regulators National Physiotherapy Competence Exam Results

Cohort 1 & 2 graduates	N=37	N=29*	
Pre Bridge PCE Written FAIL	15	8	Pre Bridging PASS 3/11 = 27%
Pre Bridge PCE Written PASS	3	3	
Post Bridge PCE Written FAIL	4	1	Post Bridging PASS 14/15 = 93% **
Post Bridge PCE Written PASS	14	14	
No Attempts at PCE Written	13	10	34% have not yet attempted written
Pre Bridge PCE Clinical FAIL	6	6	Pre Bridging PASS 0/5 = 0%
Post Bridge PCE Clinical FAIL	5	5	Post Bridging PASS 9/14 = 64% **
Post Bridge PCE Clinical PASS	9	9	
No attempts at PCE Clinical	24	16	
Provisional License	4	4	
Full License	9	9	

*Represents actual numbers of AIEPB Program graduates being followed. Of original 37 - 5 lost to attrition, 2 failed Program and 1 emigrated to Australia

** IEPTs have multiple attempts to pass PCE. These are the PASS rates to date, not final pass rates.

October 9, 2015

2016-2017 University of Alberta Calendar Graduate Program Changes:

IMPLEMENTATION: STANDARD

TYPE OF CHANGE: NEW CERTIFICATE
NEW COURSES

Current	Proposed
<p>Faculty of Graduate Studies and Research 205 Graduate Courses</p> <p>205.67 Rehabilitation Medicine</p> <p>205.67.4 Certificates</p>	<p>205.67 Rehabilitation Medicine</p> <p>205.67.4 Certificates 205.67.4.5 The Post-Baccalaureate Certificate in Bridging to Canadian Physical Therapy Practice</p> <p>Physical Therapists who have completed their professional entry-level education outside of Canada may find it difficult to transition and integrate into the healthcare workplace in Canada. This certificate offers an opportunity for internationally educated physical therapists to address gaps in academic and clinical knowledge, to update clinical skills and competencies, and to be introduced to the Canadian physical therapy context through clinical mentorship and supervised practice in a clinical placement. Canadian trained physical therapists who have been out of the workforce for an extended period of time may also find the certificate courses to be of benefit as a professional update.</p> <p>Entrance Requirements</p> <p>The minimum admission requirements are 1) a baccalaureate degree in physical therapy from a recognized institution or equivalent (as assessed by the Canadian Alliance of Physical Therapy Regulators) and 2) English language proficiency with a Test of English as a Foreign Language (TOEFL iBT) minimum score of 92/120 overall and no subtest lower than 21 or an International English Language Testing System (IELTS) minimum score of 7.0 overall and for all subtests.</p> <p>Program Requirements</p> <p>The post-baccalaureate certificate will be granted upon</p>

**231.234 Rehabilitation Medicine, REHAB
Faculty of Rehabilitation Medicine**

Note: Normally all REHAB courses are restricted to students in Rehabilitation Medicine. Students from other faculties require consent of the instructor offering the course

Graduate Courses:

....

successful completion of five required graduate-level courses: REHAB 520 (* 3), REHAB 521 (*3), REHAB 522 (*2), REHAB 523 (*2) and REHAB 524 (*4). See _231 for a description of the courses.

REHAB 520 Professional Physical Therapy Practice in Canada I: *3 (either term or Spring/Summer, 3-2-3 in 14 weeks) This 14 week blended format course builds on the context of the Physiotherapy Practice in Canada course. It focuses on the development of the knowledge, skills and judgment required to deliver safe and effective PT care in the Canadian setting, clinical reasoning and professional communication. Pre-requisite: Physiotherapy Practice in Canada and/or approval of the Faculty.

REHAB 521 Professional Physical Therapy Practice in Canada II: *3 (either term or Spring/Summer, 3-2-3 in 14 weeks) This 14 week blended format course consolidates skills required by a primary care PT in interpretation, diagnosis and application of assessment findings and treatment plans through the application of clinical decision making model(s), critical thinking and evidence-based practice.

REHAB 522 Physical Therapy Mentorship Experience I: *2 (either term or Spring/Summer, 40 hours) This clinical course comprises 40 hours of off campus clinical experience at a University of Alberta affiliated facility under the mentorship of a licensed physical therapist. This course applies physical therapy knowledge, skills and attitudes learned concurrently in REHAB 520 in the clinical setting. Students advance from introductory exposure through shadowing to skill demonstration within a PT practice setting. Co-requisite: REHAB 520.

REHAB 523 Physical Therapy Mentorship Experience II: *2 (either term or Spring/Summer, 40 hours) This clinical course comprises 40 hours of off campus clinical experience at a University of Alberta affiliated facility under the mentorship of a licensed physical therapist. This course builds on the application of physical therapy knowledge, skills and attitudes from REHAB 522 and learned concurrently in REHAB 521. Students advance from skill demonstration to full integration and application within a PT practice setting. Pre-requisite: REHAB 522. Co-requisite: REHAB 521.

REHAB 524 Clinical Placement: *4 (either term or Spring/Summer, 240 hours over 6 weeks) This full-time placement is completed in a University of Alberta

	affiliated facility and provides the clinical experience to allow for consolidation of required PT clinical knowledge, skills and attitudes. The student will be expected to independently carry an appropriate clinical caseload and demonstrate practice readiness. Pre-requisite: REHAB 521 and REHAB 523.
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These five new courses in Rehabilitation Medicine form the new cost recovery, post graduate certificate: **The Post-Baccalaureate Certificate in Bridging to Canadian Physical Therapy Practice.**

Certificate Consultation and Approval Process to date:

- FRM Executive Committee – approved Sep 17th
- Physical Therapy Dept Council – approved Sep 18th
- FRM Faculty Council – approved October 6th
- FGSR Council – approved Oct 21st

Cost Recovery Approval Process:

- RACF October 20th