Story Starter for Discussion on Technology Trends, Online Learning and MOOCs
for BC Post-Secondary Leadership Council Meeting, February 7, 2013.
Wosk Centre for Dialogue, Simon Fraser University.

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The educational press is full of stories these days about the disruptive forces confronting higher education, challenging the structure of the post-secondary education system. The headlines from Academica, the Chronicle of Higher Education, and popular press talk about a tsunami of change approaching and the need for institutional Presidents to prepare to surf that wave. This is a metaphor that Stanford University's President used in a New Yorker interview last year.

Headlines such as:

- *Why Google Will Enter The E-Learning Industry*
- *Flipped Classrooms Work for Students*
- *Learning analytics aim to boost student retention*
- *Are MOOCs, or personalization the future?*
- *The Object Formerly Known as the Textbook*
- *American Council on Education Recommends 5 MOOCs for Credit…*

…attempt to have us pay attention to trends that may be influencing and affecting teaching and learning practices. The increasing use of consumer grade technologies in classrooms and the availability of mobile and tablet devices that allow ubiquitous interaction with learning materials and mentors means that significant learning activity can happen outside of classrooms, too.

The availability of free, almost free and especially open resources calls into question the way in which learning materials are licensed, provisioned and priced.

The exploration of massive open online courses with automated marking systems begins to push the boundaries of access, cost and flexibility for learners. How long will be before degree-granting bodies using sophisticated prior learning assessment mechanisms begin to credential learning taken outside of campus boundaries? This development echoes predictions in the book *The Social Life of Information* (2000) by John Seely Brown and Paul Duguid.

All of these dynamics are in motion around us, some within our own educational institutions and in others beyond our borders in other jurisdictions.

The management of technology-enabled learning practices, often called *online learning* is actually becoming a blur on some campuses, where all courses in every program have a significant online component. In fact, it is becoming such a blur that it is hard to assess the scale of technology-enabled learning on many of our campuses. We are told that it is hard to count what is purely face-to-face, online, hybrid, or blended, except in instances where a program is developed specifically for a target audience for whom a fully or primarily online program **is** the design.

At BCcampus we partnered with colleagues in Alberta last spring to survey post-secondary institutions about the management of online learning on their campuses. Between Alberta and BC we managed about a 50% response rate. In BC, all sectors including research universities teaching universities, institutes and colleges were represented in the responses. An executive summary of the survey can be found on our web site

What we found was:

- Responsibility for online learning has grown in stature with VPs Academic as the primary authority on campus. As one VPA stated, "responsibility for online learning has fallen upwards."

- Instructors continue to play a critical role in the growth of online education, both as part of institutional strategies and as innovators working independently.

- Most institutions see online students as part of their F2F population that have chosen to take a minority of courses online. Institutions plan and provide services accordingly.

- Quality assurance issues are foremost in the minds of PSE sector administrators, and faculty development is a premier "piece of the innovation cycle." Larger institutions struggle to identify which instructors are teaching online and their needs for development and support.

- Striking a balance between centralized control of product and delivery quality, one the one hand, and innovation on the part of the knowledge provider (i.e. faculty member) on the other is difficult and represents a significant challenge to QA.

- Teaching and learning centres play an increasingly important role in the administration and guiding of online learning initiatives.

- Structural constraints that vex some institutions include the juxtaposition of institutional autonomy and a lack of sector wide consensus and/or coordination.

2

What institutional leaders would like to know from future surveys:

- The character of quality assurance at other institutions.

- How collective agreements address online learning.

- Good practices for strategic planning for online education, including practices for engaging institutional stakeholders in steering of the development of online education strategies, policies and practices

Across the BC post-secondary system there is keen interest in technology-enabled learning, but there remain a lot of questions about how it either fits with current conceptions of higher education or whether it will lead to a renaissance in higher education structures and practices. BC remains a leader in online learning the Canadian context, and we should strive to support and enhance our position as a post-secondary system.

Bold experiments **are** taking place, but there remains fragmentation of knowledge and very few indicators of success across the system. MOOCs are only one of the challenges confronting educators who seek to use technology-enabled learning strategies.

The wittiest comment I've seen in this regard was in a tongue-in-cheek tweet yesterday afternoon from the University of Calgary, in an exchange between a UoC edtech leader, D'Arcy Norman (@dlnorman) and professor Martin Weller (@mweller) at the Open University of the UK. They were talking about *MOOC hysteria*.

@dlnorman: @mweller "I'm holding out for MOOC 2.0. I'm sure **THAT** will be the game-changer."

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3

STUDENT SERVICES SURVEY RESULT

Purpose of the Survey

The Student Services Survey was conducted by BCcampus in order to understand what kinds of issues post-secondary students are having with the **current student services** and to find out how BCcampus can better help these students.

Who We Are

BCcampus is a publicly-funded organization that works to improve online education services for B.C. public post-secondary students. We are working to improve our student services such as ApplyBC, CoursesBC and MyCreditsBC.

Method

In the online survey, respondents were asked to choose from a list of possible answers. For certain questions, they were given the option to choose 'Other' open-ended response with a text field next to it.

Duration and Respondents

The survey ran for 18 days in April 2013, and was published by email, on course homepages, and on Social Networks. The **926 students** who responded attend one of the following **post-secondary institutions**:
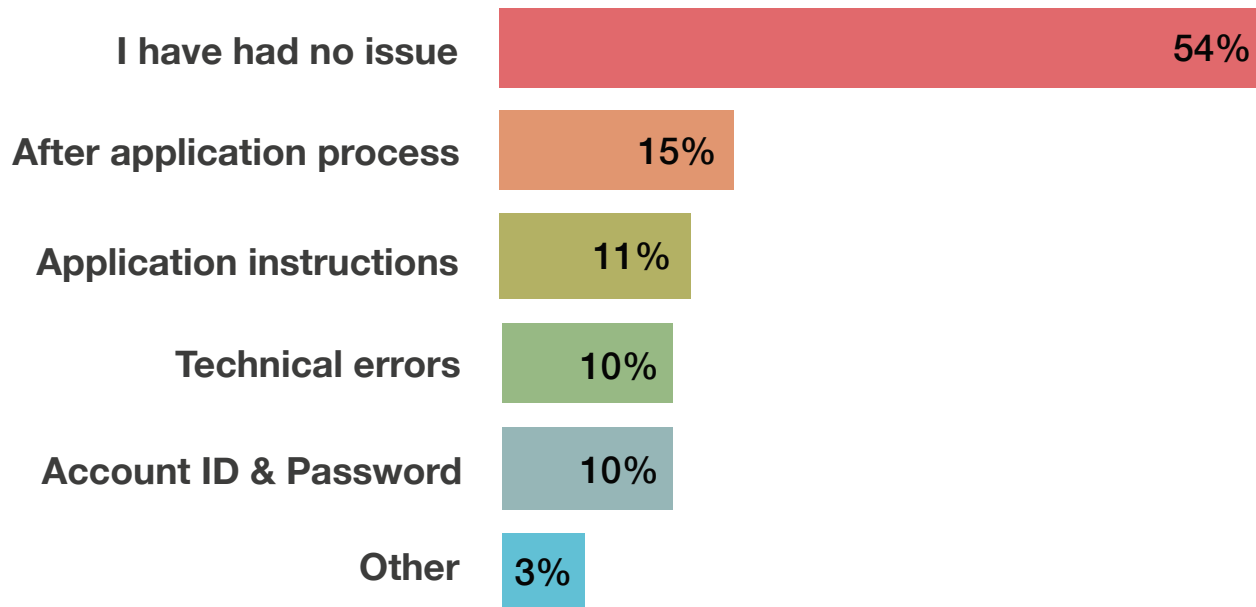
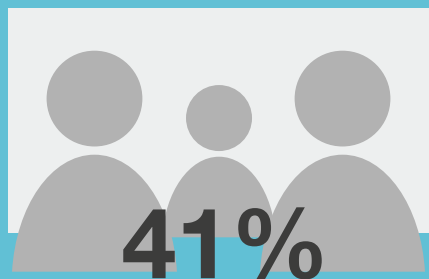|		
BC Institute of Technology	Nicola Valley Institute of Technology	University of British Columbia
College of New Caledonia	North Island College	University of Northern British Columbia
Camosun College	Northwest Community College	University of Victoria
Capilano University	Okanagan College	Vancouver Community College
Douglas College	Selkirk College	Vancouver Island University
Kwantlen Polytechnic University	Simon Fraser University	
Langara College	Thompson Rivers University	

POST SECONDARY ONLINE APPLICATIONS

Q. When you were applying to B.C. post-secondary institutions online, did you have difficulty with any of these? (multiple answers)

I have had no issue	54%
After application process	15%
Application instructions	11%
Technical errors	10%
Account ID & Password	10%
Other	3%

Q. Which type of post-secondary online applications had the issue(s) mentioned in the previous question?

Institution's Own Service **45%**
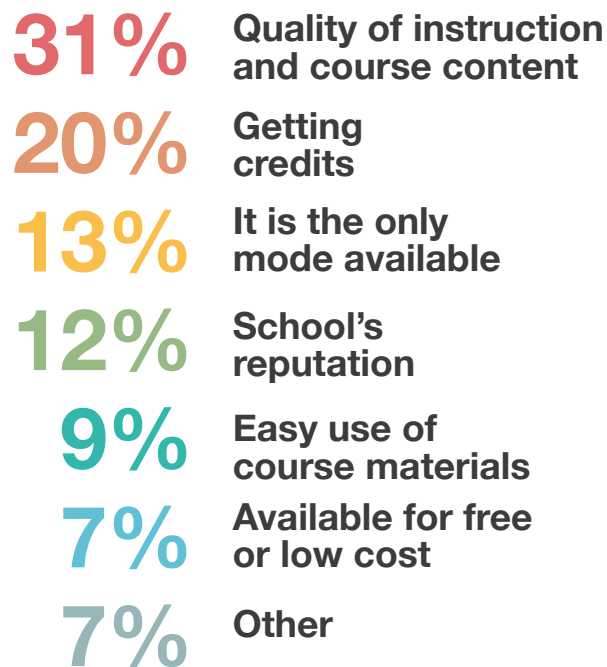
"I do not know" **28%**

ApplyBC.ca **16%**

Both **11%**

ONLINE COURSES

Without a restriction on time or location:

41%
of students prefer face to face courses

38%
prefer a mix of the two

28%
of students prefer fully online courses
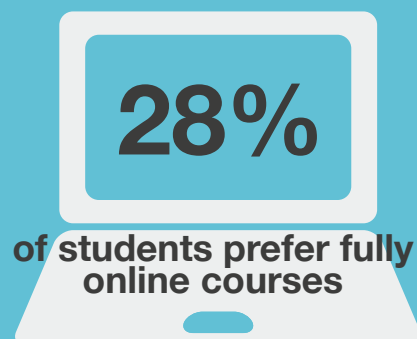
The factors that affect the selection of online courses:

31% Quality of instruction and course content

20% Getting credits

13% It is the only mode available

12% School's reputation

9% Easy use of course materials

7% Available for free or low cost
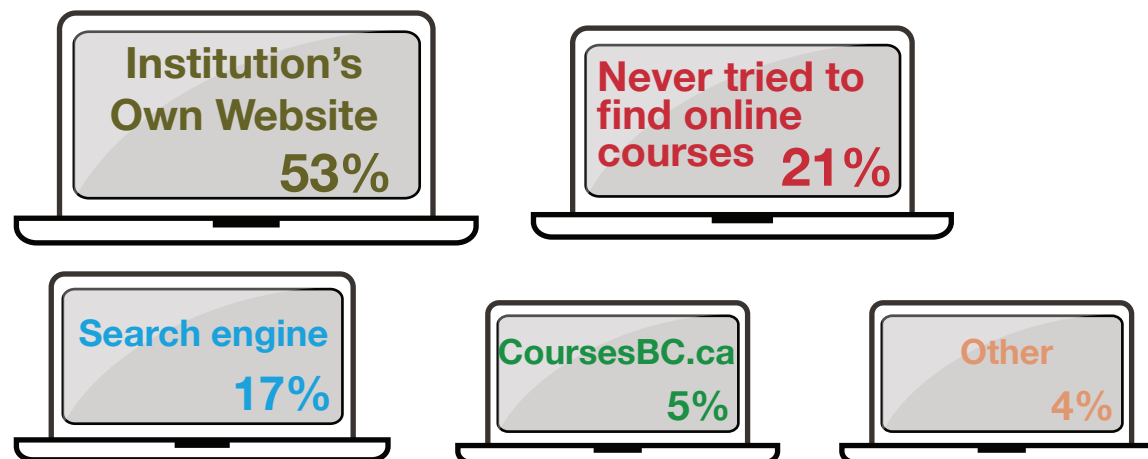
7% Other
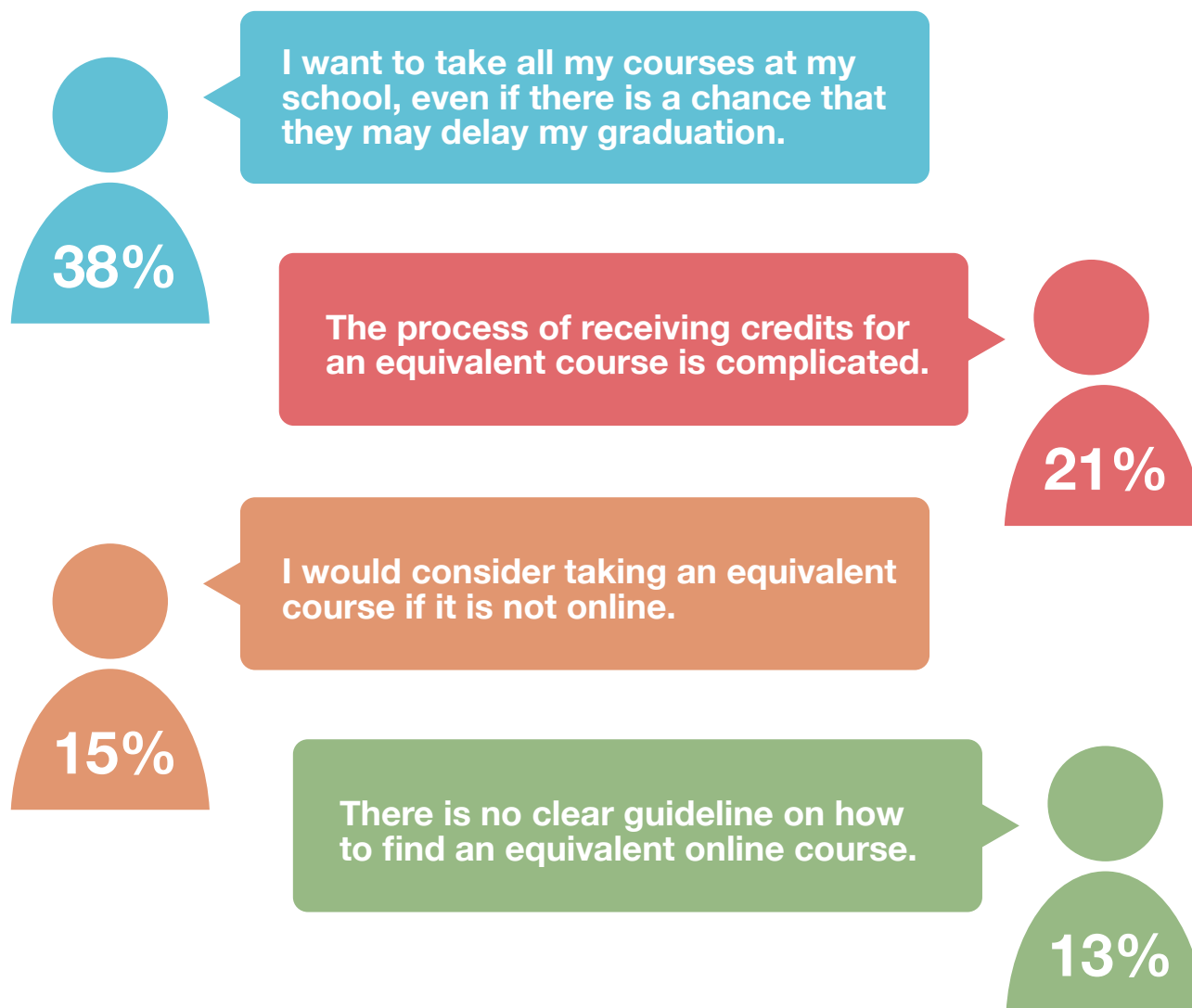

54%
of students are currently taking online courses

58%
of students feel that there are not enough online courses available

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Q. How do you usually find online courses?

Institution's Own Website 53%

Never tried to find online courses 21%

Search engine 17%

CoursesBC.ca 5%

Other 4%

The other 25%'s reasons for not considering online courses at other institutions are:

I want to take all my courses at my school, even if there is a chance that they may delay my graduation.

38%

The process of receiving credits for an equivalent course is complicated.

21%

I would consider taking an equivalent course if it is not online.

15%

There is no clear guideline on how to find an equivalent online course.

13%

75%

of students would consider taking an equivalent online course at another institution

Over the past year

47%

of students have experienced being placed on a waitlist for a course

TRANSCRIPTS, ADVISING & COUNSELING SERVICES

Q. Are your transcripts useful to you?
If so, what is your reason for checking your transcripts?

77% **Checking my academic progress**

10% **Transferring to another institution**

8% **No, transcripts are not useful.**

5% **Other**

Q. Which aspects of advising and counseling services do you think should be improved?

49% **"I want an online advising service."**

31% **"I want advising office hours to be increased."**

92% of students have NOT had any difficulty retrieving their unofficial transcripts from their school website

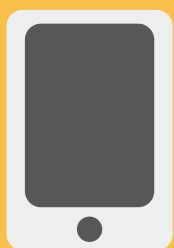**53%** of students check their transcript at least a couple times each semester

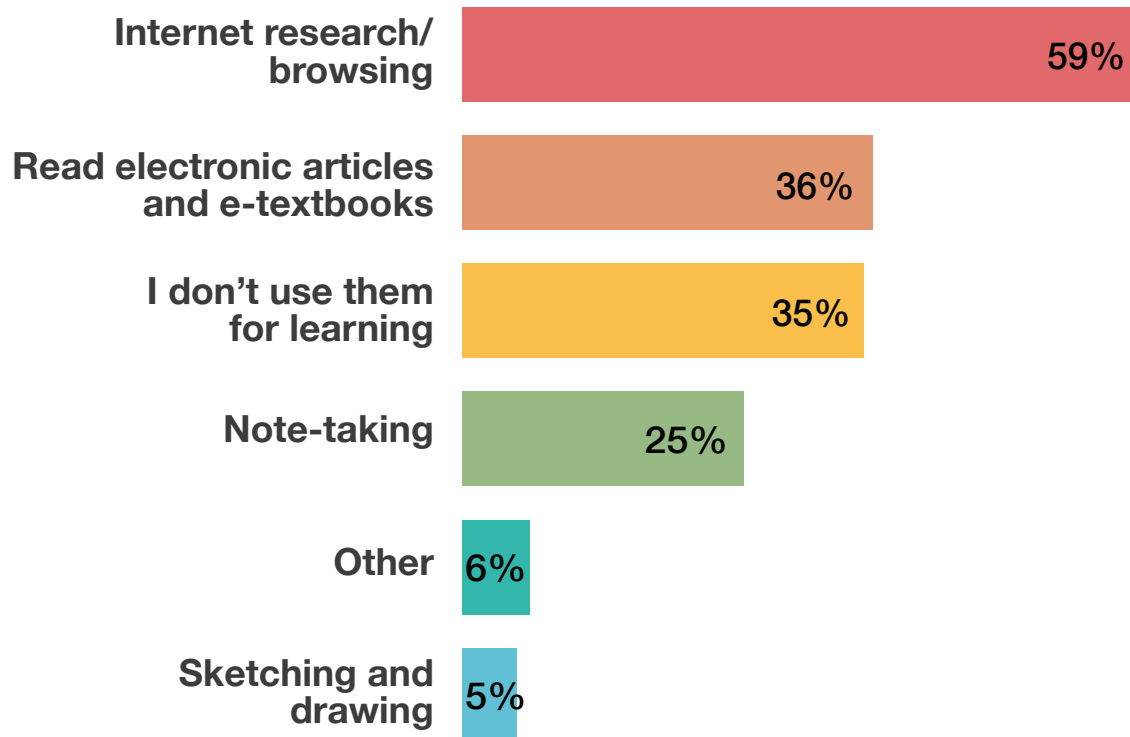For checking transcripts, class schedules, and paying tuition:

92%

of students use a desktop or laptop to access student services

8%

use a mobile device like a smart phone or tablet

Q. How do you use your mobile devices for learning? (multiple answers)

Category	Percentage
Internet research/browsing	59%
Read electronic articles and e-textbooks	36%
I don't use them for learning	35%
Note-taking	25%
Other	6%
Sketching and drawing	5%

54%

of students agree that it is important to be able to access student services from their mobile device

Q. Which social networks do you use? (multiple answers)

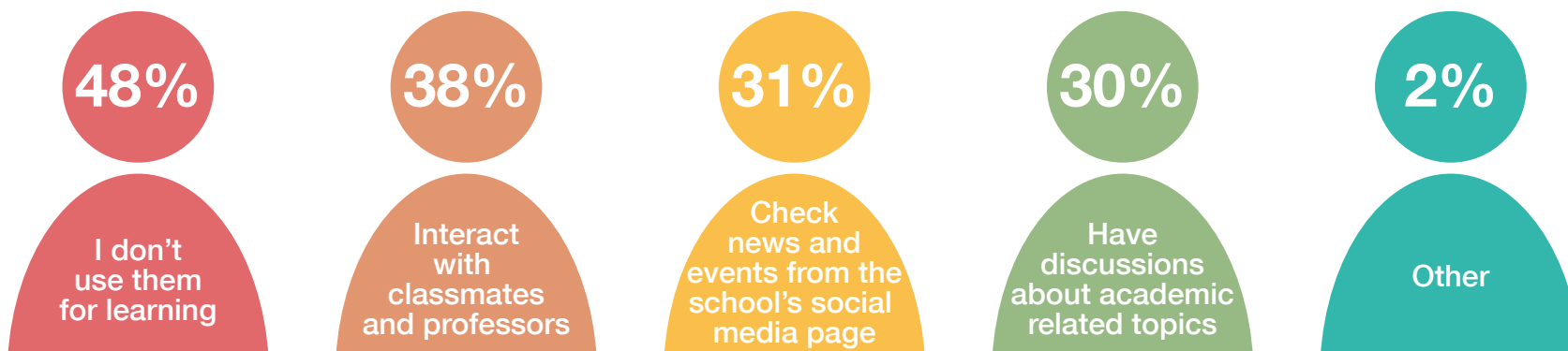|	
f	90%
Twitter	34%
g+	28%
in	22%
None	6%
Other	6%
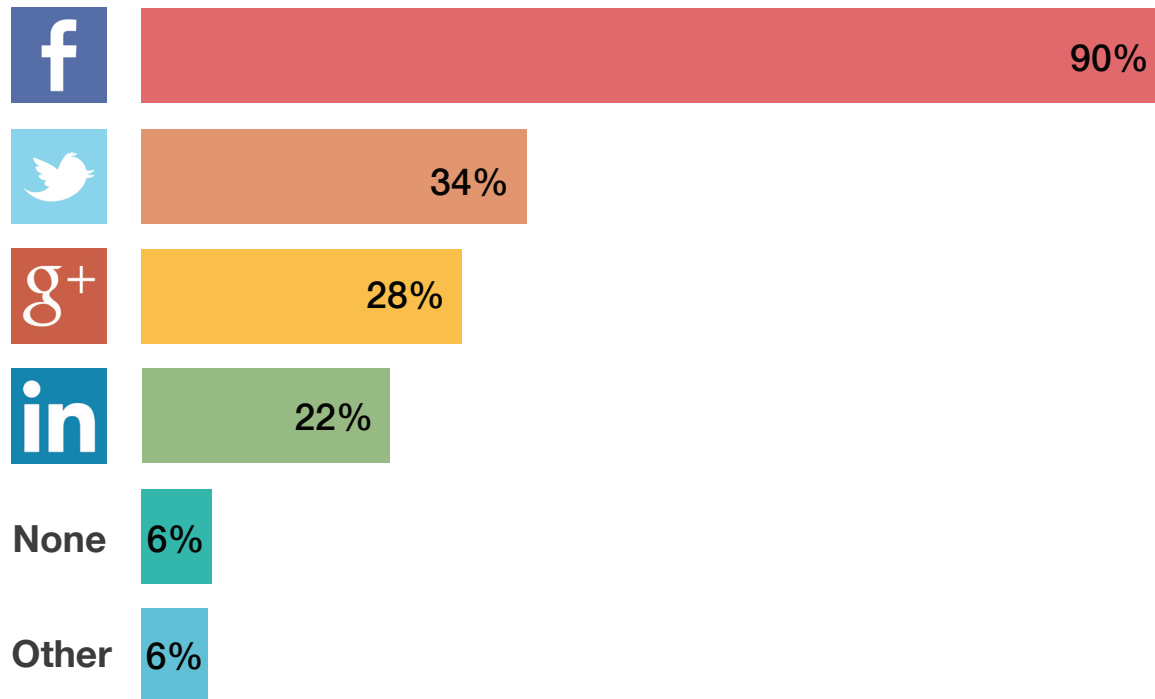
87%
of students say their courses do not require the use of social networks

78%
of students check their social networks "often" per week

Q. How do you use social networks for learning purpose? (multiple answers)

48% I don't use them for learning

38% Interact with classmates and professors

31% Check news and events from the school's social media page

30% Have discussions about academic related topics

2% Other

Students identified the top three most important student services:

1	**Academic Advising (77%)**
2	**Registrar and Enrolment (67%)**
3	**Library (44%)**
4	**Financial Aid (34%)**
5	**Co-op/Careers (31%)**
6	**Counseling (23%)**
7	**Tutoring (17%)**
8	**Health Services (7%)**

54%

of students agree that all student services should be available online

There were some differences in preference between different types of students:

Face to Face or Online

73% of students who are NOT currently taking online courses preferred fully face to face courses; however, only 14% of students who are currently taking online courses preferred fully face to face courses.

Wait List

Over the past year, 62% of students who are NOT currently taking online courses have been placed on a wait list, whereas only 33% of students who are currently taking online courses have been placed on a wait list.

Mobile Devices

63% of traditional students agree that accessing student services from mobile devices is important, whereas only 46% of online students agree with this.

I am not taking online courses

I prefer face to face courses.

I have been placed on a waitlist.

Accessing student services from mobile devices is important.

I prefer online classes or blended courses.

I have not been placed on a waitlist.

Accessing student services from mobile devices is not as important to them.

I am taking online courses

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Education Technology Trends
(Based on a paper by David Porter)

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Today's students expect to use their own electronic devices as a part of the education process. At the same time, consumer technology trends are directly affecting the manner in which learners can interact with instructors and peers. Those trends include:

- The growth of consumer-oriented broadband and wireless technologies
- The proliferation of wireless mobile communications devices and tablet-based personal computing devices
- The exponential growth and penetration of social networking and online visual media

Even as new technologies emerge, more extreme challenges for the post-secondary education sector may be on the horizon. Adrian Sannier, writing in the EDUCAUSE Review (November-December 2011) posed the notion of *The Four Beyonds*.

- Beyond textbooks

- Beyond bookstores

- Beyond learning managements systems (LMS)

- Beyond school *(meaning, the increasing opportunity for free, open and self-directed education to play a role in the larger higher education and training space).*

Sannier speculated that within five years, "all four of these will be shattered."

Online education is experiencing rapid growth in North America. Yearly studies by the Sloan-C consortium in the United States have reported growth of over 10% per year in online course enrolments over the past five years. However, there is no similar national data for Canada.

- Documented growth of over 10% per year in online education in the US has been reported by Sloan-C (2011). Thirty-one percent of all US higher education students take at least one course online. The growth rate of online education enrolments is increasing at a faster pace than that of face-to-face enrolments in US institutions.

- Although there are no national statistics in Canada, a recent report by Contact North (2012) estimates there are approximately one million online course registrations in Canadian higher education, equivalent to about 100,000 FTEs

- There is a good deal of innovation and development of online education in Canadian post-secondary education, but it is mainly at the grass roots level, promoted or supported increasingly by strong, professional centres of teaching, learning and technology within the institutions (Contact North, 2012)

- Quality of online courses still varies considerably despite most provinces having in place best practice guidelines for degree approval processes (Bates, 2012)

- Although Canada currently has a robust post-secondary online education culture at a grass roots level, a lack of strategic focus on online education at national, provincial and above all institutional levels threatens its future development and may well result in Canada being left behind by international competitors. (Bates, 2012)

1

There is the opportunity to develop a flexible learning environment to:

- Help students, via a **single point of service,** make informed decisions about programs and courses through an integrated information system that draws upon program, course and transferability information from all system partners, including labour market information (LMI) that helps them realize their job potential within the education path they are considering.
- Make better use of **technology for instruction**, providing access, flexibility and options for students to match their needs and lives;
- Provide **training and professional development to instructors** that will help them to use educational technology to achieve intended program and course outcomes;
- Promote the use of **open education resources** that take teaching and learning beyond the walls of institutions. We need to promote and demonstrate the use of open educational resources that can be freely distributed, re-engineered and localized to meet emerging needs in academic and career vocational subject areas;
- Design, develop, adopt or adapt **open textbooks** that can lower costs for print and online resources for students and their families;
- Provide institutions with **real-time and historical data on demand** that enable them to plan educational programs that meet the needs of all learners. By linking real-time data and pairing it with historical data from an open data warehouse, institutions could respond more quickly to projected digital shifts.

Initiatives to take advantage of these trends could include:

- Institutions could list and report all fully online courses and their transferability in a common BC directory – an enhanced CoursesBC.ca directory
- Establishment of collaborative online trades programs and services. The Camosun College Professional Cook Program (E-PPRENTICE) is an exemplar of this approach.
- Development of a single online web portal for students to access their various educational services such as: researching programs, planning their studies, applying to institutions, finding and registering for courses, applying for financial aid, studying online, receiving tutoring support, managing their records and transcripts.
- A provincial Credit Bank service that provides options for challenge and prior learning assessment for students pursuing individual studies by online education or open courseware.
- Establishment of training programs for faculty and instructors who wish to learn to teach online.
- Establishment of quality assurance guidelines for the development and delivery of online programs and courses by all institutions and training providers.
- Support for the development, adoption or adaptation of open educational resources and open textbooks

2

Open Textbooks Initiative

S16

Background - First 40

- October 16, 2012, government of BC announced that it would develop open textbooks for the 40 most popular first and second year undergraduate courses. (See appendix 1 for a list of courses).
- BCcampus is the system agency that is managing the project. It has the expertise and experience in dealing with open education resources and in developing curriculum and other educational resources. $1 million has been transferred to BCcampus to fund the project.
- BCcampus established an advisory committee of post-secondary representatives to advise on which courses should be chosen.

Three phased approach

Phase 1 - Mid April 2013: Call for Proposals for reviews of 10 to 20 <u>existing</u> open textbooks that link to the 40 high enrollment subject areas. The call will include plans for adopting the textbooks.

Proposals will be received through the spring, with reviews completed in time for at least 10 textbooks to be made available by **September 2013**.

Phase 2 - Mid September 2013: Building on lessons learned from phase one (and taking into consideration availability of faculty and instructors), a second call for proposals will be issued mid September 2013 to <u>remix and adapt</u> existing open textbooks. Another call for reviewers of these remixed textbooks will be put out at this time as well.

Proposals will be received through the fall, with remixed textbooks being developed and reviewed in winter/spring 2014, and made available by **September 2014**.

This phase will also include and extension of phase 1 - reviews of existing open textbooks that have been identified since the call for proposals issued in mid April.

Phase 3 - December 2013: If gaps remain in resources for the 40 identified subject areas, then a third call for proposals will be issued in **January 2014** for the creation of <u>new open textbooks</u>.

Open Textbook Update

- A call for review was announced in April for 15 open textbooks. 60 professors and instructors committed to review these open textbooks. 17 public and three private institutions are represented. 15 of the 60 reviewers are from the four major research universities.
- The reviews were due by September 3 and are now posted online at BCcampus' open textbook repository. (In a similar way that reviews accompany books on Amazon.com or Chapters.ca)

- Texbooks that have been reviewed include:

  1. Biology
  2. Mastering Strategic Management
  3. Introductory Chemistry
  4. Organic Chemistry
  5. Microeconomics
  6. Principles of Marketing
  7. Collaborative Statistics
  8. Introductory Statistics
  9. Calculus – Early Transcendentals
  10. College Algebra
  11. Introduction to Psychology

- Another 21 existing open textbooks have been identified which will be reviewed following another call for proposal to issued later this month. There are also eight textbooks on the website that have not been reviewed, but will be reviewed as part of the Phase 2 Call for Proposals. The eight texts to be reviewed in Phase 2 are:

  1. Computer Science : Database Design
  2. Computer Science: Presentation Software
  3. Business, Business Administration and Management: Project Management for Business
  4. Kinetics/Kinesiology: Anatomy and Physiology
  5. English: Writing for Success
  6. Philosophy: Modern Philosophy
  7. Accounting: Accounting Principles, A Business Perspective (Financial)
  8. Economics: Macroeconomics

- Most instructors have developed their course outlines and list of resources and materials during the summer and have already posted them online. For this reason, it is unlikely that there will be many instructors that use open textbooks in the fall semester – they will have not had enough time to consider using open textbooks.
- Nevertheless, there will be some instructors who opt to use the open textbooks. BCcampus is in the process of identifying them. It is likely that these instructors will not be identified until early September.

In addition to the work on just developing open textbooks, BCcampus has undertaken a lot of awareness building and promotion activities, these include:

- Hosted an Open Textbook Summit in Vancouver in April which brought together representatives from Alberta and US states and education agencies.
- Made presentations to Articulation Committees to provide information and promote awareness. Committee meetings attended to date included: Physics, Health, Biology, Chemistry, Economics, Sociology, Anthropology, Mathematics, Statistics and Communications.
- Held adoption workshops at various post-secondary institutions including: University of British Columbia, Douglas College, Camosun Colleges, and Royal Roads University. Also made a presentation to the Educational Technology User Group (a group of post-secondary educational practitioners interested in the ways in which learning and teaching can be enhanced through technology).
- In the process of developing an online self-paced workshop for faculty on how to adopt and use open textbooks.
- UBC's Office of Learning Technology has expressed interest in the open textbooks initiative. The Office and BCcampus have had one initial meeting to discuss how open textbooks could

be incorporated into UBC's flexible learning initiative. In addition, BCcampus has been invited to make a presentation to UBC faculty about open textbooks at a fall conference.

Background - Next 20

- Government committed to develop 20 new open textbooks as part of its election platform.
- The Minister has made a decision on the focus for the next 20, but this decision has not yet been announced.

    o Open textbooks for skills. Subject areas could include tourism, technology, trades, adult basic education, business programs and other areas where there is a need to increase the supply of skills.
    o BCcampus plans to hold a meeting of its open textbook advisory committee to seek direction on which skills areas to focus on.

- The proposed timeline is:
    o
                                        S16

    o Winter/Spring 2014 – call for proposals announced.
    o Summer to Fall 2014 – textbook development/adaptation underway.
    o Winter/Spring 2015 –20 additional textbooks available. This will give instructors time to consider the textbooks for adoption for their courses for September 2015.

Appendix 1 – List of Courses for the Open Textbook Initiative

1. Year 1 English
2. Year 1 Math & Stats
3. Year 1 Psychology
4. Year 1 Economics (Micro and Macro)
5. Year 1 Biology
6. Year 2 Math & Stats
7. Year 1 Accounting
8. Year 1 Chemistry
9. Year 1 Physics and Astronomy
10. Year 1 Sociology
11. Year 1 Philosophy
12. Year 1 Computer Science
13. Year 2 Chemistry
14. Year 1 Business, Business Admin & Management
15. Year 2 Psychology
16. Year 1 Criminology
17. Year 2 Accounting
18. Year 2 Economics (Micro and Macro)
19. Year 1 Marketing
20. Year 2 Biology
21. Year 2 Commerce
22. Year 1 Anthropology
23. Year 1 Business Info Systems/Business Computer Systems/Business Info Tech
24. Year 1 Visual Arts, Media & Design
25. Year 1 Earth, Ocean & Atmospheric Science
26. Year 1 Kinetics/Kinesiology
27. Year 1 Communications
28. Year 2 English
29. Year 1 Geography
30. Year 2 Human Resources and Organizational Behaviour
31. Year 1 Applied Science
32. Year 1 French
33. Year 1 History
34. Year 1 Political Science
35. Year 2 Visual Arts, Media & Design
36. Year 2 Communications
37. Year 2 Sociology

38. Year 2 Applied Science
39. Year 2 Political Science
40. Year 1 Human Resources and Organizational Behaviour

Administrative Services Delivery Transformation

S16

Background

- In Budget 2012, government committed to working with public post-secondary institutions to reduce overhead costs, look for efficiencies and find savings in non-academic administrative functions.
- The terms of reference for ASDT includes:
  - administrative efficiencies,
  - sharing of best practices,
  - cost savings, and
  - enhanced quality of services provided to the province.
- The goal is two-fold: to find administrative efficiencies, while protecting and maximizing our investments in students' education.
- In support of these collaborative efforts the ministry engaged Deloitte to provide a quantitative and qualitative assessment for the opportunities identified.
  - Consistent with the Deloitte Report, it has been determined that it would be beneficial to phase in these reductions over three years to permit additional time for administrative opportunities to begin to yield ongoing savings.
  - The original budget plan was for savings of $50 million over 2 years, $20 million in 2013/14, and $30 million in 2014/15. The revised plan is for savings of $5 million in 2013/14, $20 million in 2014/15, and $25 million in 2015/16.
- Deloitte identified a variety of opportunities which they divided into three tiers. BC is pursuing the first two tiers. According to the Deloitte report, the potential savings for the Tier 1 and Tier 2 opportunities are estimated at $38M to $83M per year. It may take up to six years to fully implement and realize savings. Some opportunities will require up front investments. (See Appendix 1 for a listing of all opportunities.)
  - Some of these opportunities include shared procurement; shared purchasing of laptops and desktop computers; standardized network hardware and software; shared contract to reduce credit card merchant fees paid by institutions; and collaborating on shipping and freight costs.
- The implementation phase is underway in 2013. It is being led by a steering committee consisting of institutional presidents representing the sector and the Deputy Minister and Assistant Deputy Minister.

Appendix 1 – Deloitte Report

Tier 1	Opportunity
1 Procurement	Shared procurement to pool spend and strategically source key common categories.
2 Procurement	Optimize overall use of P-cards and leverage the most beneficial program by exploring existing P-card programs at institutions.
3 Facilities Management	Increase collaboration for facilities related purchases, procurements and contract consolidation.
4 IT	Transition to a single Managed Print Services contract for the post-secondary sector.
5 IT	Shared post-secondary data centre facilities.
6 IT	Shared procurement of desktop and laptop hardware (workstations).
7 IT	Standardize network hardware and software and share procurement.
8 Finance	Shared contract to reduce credit card merchant fees for tuition and non-tuition revenue.
9 Ancillary Services	Explore shared print shop services provided by one institution or an external service provider for those with contracted out print shop services.
10 Ancillary Services	Collaborate on shipping / freight to obtain higher discounts.
11 Ancillary Services	Collaboration to obtain higher commissions on vending machine contracts.

Tier 2	Opportunity
19 Procurement	Additional strategic sourcing opportunity: - Tier 1 Strategic Sourcing analyzed approximately 36% of provincial spending. This opportunity would address the remaining 64%.
20 Facilities & Capital Management	Create a capital management / planning Centre of Expertise (COE) (provincial or regional).
21 IT	Shared cloud-based email implementation.
22 Ancillary Services	Explore potential to transition to a single food services contract for the post-secondary sector for those currently contracting this service.

LEAN initiatives in AVED

- BC has used LEAN as a way to make government more efficient.   S16

S16

Strategic Overview

- In April 2012, BC Public Service launched a LEAN continuous improvement approach to integrate with, and build upon, previous efforts to deliver better quality customer service to British Columbians and our internal customers.
- Lean is a re-examination of what we do through the eyes of the people we serve. Originally a way of improving manufacturing processes, LEAN has become a fully developed system of looking at the work of an organization, encouraging innovation in order to improve service, quality, safety and staff engagement.
- We are committed to a LEAN approach for compelling reasons and with a sense of urgency. With increasing economic pressures and recruitment challenges; utilizing a LEAN continuous improvement approach expands our commitment to foresee opportunities to respond to change, remain inclusive and collaborative with our working partners and proactively save time and resource by eliminating inefficiencies and implementing continuous improvement.

LEAN Principles at AVED:

- Collaborate, evaluate, plan and strategically focus on ways to eliminate processes that do not add value or may even impede our service delivery.
- Use a LEAN approach and the DMAIIC methodology to involve clients in making process improvements and communicate changes effectively.
- Increase employee involvement and understanding of the value related to LEAN Six Sigma continuous improvement philosophy and tools.
- Select LEAN projects throughout the year that reach into different divisions and lines of business to demonstrate the value, flexibility and efficiencies of LEAN

Lean Progress to Date:

- Year 1 (2012/13) LEAN projects:
    - Ministerial Correspondence
    - Procuring Office Supplies

- Year 2 (2013/14) LEAN projects:
  - BC Knowledge Development Fund
  - Post Secondary Institutions Designation Process
- Several "where we work" projects – smaller in scale were identified and some are underway, led by front line staff to identify and improve business processes
- Established a ministry employee Lean Network to support Lean in the Ministry including a SharePoint site for knowledge, celebration and project repository
- Implement a culture change strategy
- Offer Lean training and facilitation opportunities to employees
- Maintain and enhance internal communications tools and web resources, increase participation in the Lean Network and provide a pathway for employees to get involved

New West Partnership

Assistant Deputy Minister Meeting

September 12, 2013

British Columbia, Alberta, Saskatchewan

Mandate Letters and Directions (BC Lead)
2:00pm – 3:00pm

Background

- Government Letter of Expectations (the Letters) are signed annually between each public post-secondary institution and the Ministry. The Letters have been in place since 2008.

- The Letters are the single most important communication between the Government and the institutions as they set out agreement on respective roles and responsibilities, strategic priorities and public policy issues.

- The Letters form part of the Accountability Framework for the public post-secondary institutions.

- Annual Budget Letters are issued separately to outline institution budgets, enrolment targets and operating grants for the year.

Content of the Letters

- The Letters build upon the previous year's Letters.

- Expectations in the Letters are similar for all institutions, with customization based on institutional mandates and regional priorities.

- Annual updates to the Letters incorporate current Government policy reflected in:
  - Template for Crown agency Government Letter of Expectations;
  - Government Strategic Plan and Ministry Service Plan; and
  - Minister's Accountability Letter.

- Examples of new content added for current 2013/14 Letters include:

  - Collaboration on Government's strategy for increasing the number of international students at public post-secondary institutions.

  - Collaboration between the Northern BC institutions to improve service and strengthen the operations of all public post-secondary institutions in the region; this requirement applies to only the 4 northern institutions.

  - Implementation of the Aboriginal Post-Secondary Education and Training Policy Framework.

- o Increasing expectations for institutions that are not meeting targets. For example, in Thompson Rivers University's 2012/13 Letter, the institution and the Ministry had a shared commitment to improve the institution's performance against its developmental student enrolment target. As the institution did not satisfy this expectation in 2012/13, the 2013/14 Letter shifts accountability exclusively to the institution, and increases the expectations for the institution's performance.

Current Process

- Institutions are consulted on draft Letters.

- The Ministry considers all institution feedback, provides a written response to each institution that provided input and, where appropriate, incorporates institution feedback into the final Letters.

- Final Letters are signed first by the institution board chair, then the Minister.

- Final signed letters are posted publicly on the Ministry and institutions' websites.

Changes to Processes

- Implementation of the Letters   S13   and followed the practice in place between Government and the health authorities.

- Starting this year the Ministry will review the Letters with institution sector groups as an additional consultative step before requesting institution feedback on the Letters.

Lessons Learned

- Updating the Letters annually establishes familiarity with the process, requires fewer significant changes each year, and ensures that the Ministry and institutions are annually communicating and reflecting on key policy commitments.

- The consultative approach has been well received by institutions, and is consistent Government's "no surprises" approach to relations with Crown corporations.

- A critical success factor has been commencing the development of the Letters well in advance of the March 31st deadline for finalizing the Letters. This provides upwards of one month for each major step in the process: institution review of the draft; Ministry response to institution feedback; and institution board chair signature of the final Letter.

- The Letters have been an effective mechanism for communicating government expectations, fostering dialogue with institutions on key policy issues, and improving transparency.

Attachment

- University of British Columbia 2013/14 Government Letter of Expectations.

2

GOVERNMENT LETTER OF EXPECTATIONS

BETWEEN

THE MINISTER OF ADVANCED EDUCATION, INNOVATION AND TECHNOLOGY (AS REPRESENTATIVE OF THE GOVERNMENT OF BRITISH COLUMBIA)

AND

THE CHAIR OF THE BOARD OF THE UNIVERSITY OF BRITISH COLUMBIA (AS REPRESENTATIVE OF THE UNIVERSITY OF BRITISH COLUMBIA)

PURPOSE

This Letter of Expectations between the Government of British Columbia (Government) and the University of British Columbia (Institution) is an agreement on respective accountabilities, roles and responsibilities, including high level strategic priorities, public policy issues and performance expectations. This Letter applies equally to both parties and does not create any legal or binding obligations on the parties. This Letter is reviewed and updated annually, and builds upon the positive and productive working relationship between the Government and the Institution.

1

INSTITUTION'S ACCOUNTABILITIES

The Institution is a public post-secondary institution that receives funding from the Government. The Government is responsible for setting the legislative, regulatory and public policy frameworks in which the public post-secondary institutions operate and which set the Institution's mandate, including the following statutory provisions:

Section 47 (2) of the *University Act*:

A university must, so far as and to the full extent that its resources from time to time permit, do all of the following:

- establish and maintain colleges, schools, institutes, faculties, departments, chairs and courses of instruction;
- provide instruction in all branches of knowledge;
- establish facilities for the pursuit of original research in all branches of knowledge;
- establish fellowships, scholarships, exhibitions, bursaries, prizes, rewards and pecuniary and other aids to facilitate or encourage proficiency in the subjects taught in the university and original research in all branches of knowledge;
- provide a program of continuing education in all academic and cultural fields throughout British Columbia; and,
- generally, promote and carry on the work of a university in all its branches, through the cooperative effort of the board, senate and other constituent parts of the university.

The Government and the public post-secondary institutions share a commitment to ensuring high quality post-secondary education that fosters collaboration and innovation and to building a strong economy. The Government and the public post-secondary institutions also have a shared commitment to being responsive to student and labour market demands and to addressing the overall socio-economic and regional employment needs of the province. This commitment includes the shared priority of meeting the needs of Aboriginal learners and communities and attracting and retaining international students.

The Government and the Institution also share a commitment to achieving a seamless and sustainable transfer system that supports mobility of students and portability of credits, including moving forward on improvements that resulted from the business process review of the transfer system.

In response to the Government's general direction, frameworks and principles, and in the spirit of collaboration and cooperation, the Institution will, in fulfilling its mandate, consider Government's priorities in the alignment of its institutional resources and agrees to:

- In establishing the Institution's priorities, consider the Government's goals of putting families first; creating jobs and building a strong economy; open government and public engagement; and providing regional access to post-secondary education throughout the province so that students can balance family needs and achieve their educational goals which helps families and benefits communities.

2

- Support the Government in its goal of creating jobs by assisting in the implementation of *Canada Starts Here: The BC Jobs Plan,* which can be found at: http://www.bcjobsplan.ca.

- Work in partnership with Aboriginal communities, organizations and institutes to implement the Aboriginal Post-Secondary Education and Training Policy Framework and Action Plan for the purpose of increasing the participation and success of Aboriginal learners.

- Assist in advancing Government's International Education Strategy, including promoting greater internationalization of the education system, attracting and retaining more international students, and providing increased opportunities for students and educators to study and work abroad.

- Work with school districts, high schools and other partners to increase transitions from high school to post-secondary education and training programs.

- Work together as one system to maximize investment and value for British Columbians.

- Ensure partnerships with business, industry and other stakeholders are maximized to assure responsiveness to community needs.

- Continue to strive for efficiencies and effectiveness through increased collaboration and cooperation.

- Champion a high quality, integrated, coordinated and innovative education system.

- Foster innovative approaches to education programming and focus on institutional areas of strength.

- Conduct its affairs to achieve its mandate and the performance expectations of the Government, including establishing and implementing strategies, policies, programs, plans and financial outcomes consistent with the Government's general direction and with the principles of integrity, efficiency, effectiveness, and service.

- Work with Government and system partners to identify opportunities for online services, and leverage technology opportunities to enhance educational programs and services to benefit BC citizens, including moving forward on the open textbook initiative.

- Conduct its operations and financial activities in a manner consistent with the legislative, regulatory and policy framework established by the Government.

3

The Government also sets broad legislative and policy direction to ensure the Institution's operations and performance are consistent with the Government's strategic priorities and fiscal plan. As such, the Institution agrees to:

- Conduct board matters in accordance with the Government's best practice guidelines – *BC Governance and Disclosure Guidelines for Governing Boards of Public Sector Organizations*, which can be found at: http://www.fin.gov.bc.ca/brdo/governance/index.asp. Boards are expected to operate pursuant to bylaws and policies consistent with their governing legislation, including bylaws addressing conflict of interest.

- Ensure any board remuneration is publicly disclosed on the Institution's website as required by the Public Sector Employers' Council Secretariat.

- Comply with the Government's tuition limit policy which limits tuition and mandatory fee increases. For 2013/14, fee increases will be limited to two percent. A copy of the tuition limit policy can be found on the Ministry's website.

- Ensure consolidated financial statements achieve a balanced or surplus position on an annual basis, and develop strategies to ensure this is achieved.

- Follow Public Sector Accounting Board standards in the preparation of consolidated financial statements.

- Ensure capital asset procurement is in accordance with the *Capital Asset Management Framework* developed by the Government for public sector bodies which can be found at: http://www.fin.gov.bc.ca/tbs/camf.htm. Specifically, procurement must be fair, open, competitive, transparent, and must effectively manage, budget and schedule risk.

- Establish a Project Board to oversee capital projects as directed by the Government based on a risk assessment undertaken at the planning phase.

- Manage capital projects in accordance with approved scope, schedule and budgets and manage cashflows within approved allocations, timeframes, the Government's accountability, reporting and risk management framework and without impacting provincial debt.

- Comply with the Government's requirements to be carbon neutral under the *Greenhouse Gas Reduction Targets Act*, including: accurately defining, measuring, reporting on and verifying the greenhouse gas emissions from the Institution's operations; implementing aggressive measures to reduce those emissions.

- Work cooperatively with the Government in conducting facility condition audits and maintaining and reporting facility condition, inventory and utilization data.

4

Under the Province's Cooperative Gains Mandate, savings and bargaining plans must be reviewed and approved by Government before any proposed changes to union or non-union compensation are made. Any changes to an approved plan also require approval by Government.

Commencing the effective date of any changes to the collective agreement and/or non-union compensation plans, the Institution must report to Government on the implementation of a plan, including information on progress towards meeting savings targets. The frequency and metrics used in that reporting will be defined by Government in consultation with the institution.

A review of executive compensation in Crown corporations and related recommendations were provided to government by a working group of Crown corporation board chairs in July 2012. Government has responded to those recommendations by changing elements of its executive compensation policies for Crown corporations. These policies are found at: http://www. fin.gov.bc.ca/psec/disclosuredocs/crown_corporation_executive_compensation_july_2012.pdf. While this policy does not apply to public post-secondary institutions, the policy should be considered when public post-secondary institutions are developing or revising executive compensation policies.

The Institution must comply with the Government's freeze on executive and management compensation announced on September 13, 2012.

GOVERNMENT'S RESPONSIBILITIES

The Government is responsible for setting the legislative, regulatory and public policy frameworks in which post-secondary institutions operate. In order to meet these responsibilities and support achievement of the Government's performance expectations, the Government will:

- Provide the Institution annual operating and capital funding allocations for inclusion in the Institution's planning activities.

- Provide broad policy direction and confirmation of general frameworks/principles to the Institution, within which the Institution may establish/apply specific policies/processes.

- Consult with and advise the Institution of the Government's strategic priorities, decisions and public policy that may impact the Institution.

- Consult with and advise the Institution of performance targets, objectives and expectations that may impact the Institution.

- Ensure Board appointments are filled in a timely way and support the Board's ability to fulfil its obligations.

During the term of this Letter, the Government may provide additional policy direction, and will work with the Institution to achieve such direction.

5

AREAS OF SHARED ACCOUNTABILITY

Communications

It is agreed by both the Government and the Institution that, to ensure effective and efficient day-to-day communications and relationship building, representatives for both parties will be tasked with implementing the contents of this Letter and keeping the Minister and the Institution's Board informed of progress in a timely fashion.

Reporting

The Government and the Institution are committed to transparency and accountability to the public. The Government has put in place a public reporting structure which is set out in the *Budget Transparency and Accountability Act*, the *Financial Administration Act*, and the *Financial Information Act*. The Government has provided the Institution with a Reporting Requirements document which sets out statistical, financial and performance reporting requirements and which can be found on the Ministry's website.

The Institution agrees that it will meet these reporting requirements, and ensure the provision of high quality data. Should the Government determine that changes to the reporting requirements are necessary, the Government will communicate these changes to the Institution.

The Institution shall prepare an Institutional Accountability Plan and Report that demonstrates linkages to the Government's goals, strategies and performance measures; articulates progress toward targets; explains any missed targets; and posts results on the Institution's website. The Institution's performance outcomes are expected to meet or exceed performance targets. When it is evident that the Institution's performance outcomes are at risk of falling below the performance targets, the Institution will notify Government as soon as possible, and identify actions that will be taken to manage this risk.

A draft Institutional Accountability Plan and Report will be sent to the Government for review and discussion prior to submission in final form. Dates for submission of these documents are included in the Reporting Requirements.

It is agreed that the Institution will work with the Government to meet accountability requirements, including:

- Working with the Government to reduce student loan default rates, especially in programs that have a higher incidence of students unable to repay their loans.

- Working cooperatively with the Government in data collection and the release of sufficient high quality institutional level data for use in meeting the Government's Open Data initiative.

- Providing the Government with reports and other information to enable the Government to carry out its responsibilities.

6

The Government and the Institution agree that, as a matter of course, each will advise the other in a timely manner of any issues that may materially impact the business of the Institution and/or the interests of the Government.

The Institution will post the most recent signed copy of the Government's Letter of Expectations on its website and the Government will also post a signed copy of the Letter.

Review and Revision of this Letter
The Minister of Advanced Education, Innovation and Technology is accountable for undertaking reviews of this Letter and monitoring its implementation. If deemed necessary by either party, the Government and the Institution will discuss any issues and may agree to amend this Letter on a more frequent than annual basis.

_____
Honourable Ralph Sultan
of Advanced Education,
Innovation and Technology and
Minister Responsible for Multiculturalism

_____
Mr. William Levine Minister
Chair, Board of Governors
University of British Columbia

April 9, 2013
_____
Date

March 23, 2013
_____
Date

pc: Honourable Christy Clark
        Premier

        Mr. John Dyble
        Deputy Minister to the Premier and Cabinet Secretary

        Mr. Peter Milburn
        Deputy Minister and Secretary to Treasury Board
        Ministry of Finance

        Ms. Cheryl Wenezenki-Yolland
        Deputy Minister
        Ministry of Advanced Education, Innovation and Technology

        Professor Stephen Toope
        President and Vice-Chancellor
        University of British Columbia

7

NEW WEST PARTNERSHIP COLLABORATION ON POST-SECONDARY EDUCATION AND SKILLS DEVELOPMENT PILOT PROJECT

Purpose of Discussion: Discuss current project status/project direction/desired project achievements

Project Summary:

The New West Labour Force Strategy was developed to ensure that New West provinces work together and, where appropriate, with the federal government, to meet the labour demands of their economies and support continued growth. The strategy is comprised of five labour force priorities, one of which relates to post-secondary education and skills development. Saskatchewan is leading the post-secondary education and skills development project which includes:

- Analysis of the number and skill sets of students being trained in colleges and universities against the projected needs of New West economies; and
- Recommendations to improve alignment of education programming with regional labour market needs and promote collaboration between provinces and educational institutions.

S16

Pages 36 through 40 redacted for the following reasons:
- -
S16

Meeting of British Columbia, Alberta and Saskatchewan Post-Secondary ADMs

- The meeting is scheduled to take place on September 12
- The meeting agenda is attached and is expected to be an informal and open. The objective is to discuss issues of mutual interest for all three province   S16

                            S16

- This meeting follows on from an initial meeting the ADMs had at the Council of Ministers of Education, Canada (CMEC) meeting earlier this summer.