

Monday, November 20th, 2023
Council Chamber, 2-100 University Hall
2:00 – 4:00 p.m.

OPENING SESSION

1. Approval of the Agenda (2:00 – 2:05 p.m.) Bill Flanagan
2. Remarks from the Chair (2:05 – 2:10 p.m.) Bill Flanagan
 - A. Staff Engagement Survey
 - B. People Strategy
 - C. Campus Food Bank

CONSENT AGENDA
(2:10 – 2:15 p.m.)

[If a member has a question or feels that an item should be discussed, they should notify the University Secretary, in writing, two business days or more in advance of the meeting so that the relevant expert can be invited to attend]

3. Approval of the Open Session Minutes of October 16th, 2023
4. New Members of GFC
5. Time in Program While on Leave, Faculty of Graduate and Post-doctoral Studies
Motion: To Approve

ACTION ITEMS

6. ~~Notice of Motion – Budget Model 2.0~~ (2:15 – 2:20 p.m.) Ryan Dunch
~~*Motion: To Approve*~~
Removed from the agenda at the request of the proponent
7. Student Experience Action Plan (2:20 – 2:35 p.m.)
Motion: To Endorse Melissa Padfield
Christian Fotang
Tiffany Kung
8. Integrated Asset Management Strategy (2:35 – 2:50 p.m.) Andrew Sharman
Motion: To Recommend

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DISCUSSION ITEMS

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| 9. | Question Period
(2:50 – 3:10 p.m.) | Bill Flanagan |
| 10. | Report on Student Financial Support and PhD Minimum Guaranteed Funding
(3:10 – 3:25 p.m.) | Norma Rodenburg
Tracy Raivio
Roger Epp |
| 11. | Understanding Financial Realities: An Analysis of the Financial Condition among UofA Graduate Students Report
(3:25 – 3:35 p.m.) | Bishoi Aziz |
| 12. | Updated Non-Credit/Micro-Credential Framework and Non-Credit Micro-Credential Development Guide
(3:35 – 3:45 p.m.) | Jessica Butts Scott
Janice Causgrove
Dunn |
| 13. | Introduction of a new Learning Management System of the Future
(3:45 – 3:50 p.m.) | Karsten Mundel
Jessica Butts Scott |

INFORMATION REPORTS

[If a member has a question about a report, or feels that a report should be discussed, they should notify the Secretary to the GFC, in writing, two business days or more in advance of the meeting so that the Committee Chair (or relevant expert) can be invited to attend]

14. Report of the GFC Executive Committee
15. Report of the GFC Academic Planning Committee
16. Report of the GFC Programs Committee
17. Report of the Council on Student Affairs (COSA)
18. Report of the GFC Nominating Committee
19. Report of the Board of Governors
20. Report of the President
21. Information Forwarded to GFC Members Between Meetings
 - Budget Model 2.0 Information and Discussion Sessions

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CLOSING SESSION

22. Adjournment

23. Next Meeting: January 29th, 2024

Documentation was before members unless otherwise noted.

Meeting REGRETS to: Kate Peters, 780-492-4733, kpeters@ualberta.ca

Prepared by University Governance www.governance.ualberta.ca

General Faculties Council
DRAFT Open Session Minutes

Monday, October 16, 2023
Council Chamber, 2-100 University Hall
2:00 PM - 4:00 PM

OPENING SESSION

The Chair began with a land acknowledgement:

The University of Alberta acknowledges that we are located on Treaty 6 territory, and respects the histories, languages, and cultures of First Nations, Métis, Inuit, and all First Peoples of Canada, whose presence continues to enrich our vibrant community.

1. Approval of the Agenda

Presenter(s): Bill Flanagan, President and Vice-Chancellor, and Chair of General Faculties Council (GFC)

Discussion:

The Chair noted several considerations for the approval of the agenda discussed by the GFC Executive Committee including the placement of Question Period and a change to the item concerning the Notice of Motion.

There were no questions.

Motion: The motion was moved and seconded.

THAT General Faculties Council approve the agenda.
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CARRIED

2. Comments from the Chair (no documents)

Presenter(s): Bill Flanagan, President and Vice-Chancellor, and Chair of GFC

Discussion: The Chair made and invited comments on the following:

- University Teaching Award Winners;
- A learning management system (LMS);
- Nominations for the next Chancellor;
- A recent visit of the Minister of Advanced Education;
- The launch of the Options Navigation Network; and
- A search process for the Provost and Vice-President (Academic)

V Yiu noted that more teaching awards would be launched over the next year and K Mündel provided an update on engagement sessions for the LMS.

CONSENT AGENDA

3. Approval of the Open Session Minutes of September 18, 2023

The motion to approve the items in the consent agenda was moved and seconded.

THAT General Faculties Council approve the open session minutes of September 18, 2023.

CARRIED

ACTION ITEMS

4 New Members of GFC

To Appoint:

The following undergraduate student representatives to serve on GFC for terms commencing immediately and ending April 30, 2024:

Bailey Dickie, Faculty of Agricultural, Life, and Environmental Sciences
Layla Alhussainy, Faculty of Arts
Reagan Tremblay, Faculty of Arts
Hal Kohestani, Faculty of Arts
Paige Boyer, Faculty of Business
Julia Kloet, Faculty of Business
Josh Boissonnault, Faculty of Education
Spencer Hoppe, Faculty of Education
Carter Watt, Faculty of Education
Aditya Tutika, Faculty of Engineering
Gavin Clark, Faculty of Engineering
Liam Watt, Faculty of Engineering
Madison Villiger, Faculty of Science
Gabriel Ayoku, Faculty of Science
Nole Kjemhus, Faculty of Science
Liam Richardson, Faculty of Science

CARRIED

5. Consideration of a Clean Air/Smoke-Free Policy at the University of Alberta **A. Clean Air Strategy/Smoke-Free Policy**

Presenter(s): Andrew Sharman, Vice-President (Facilities and Operations); Kevin Friese, Assistant Dean, Health and Wellness

Discussion:

The chair noted that the motion was before GFC because of a 2018 request from a member of GFC that a Clean Air Strategy be developed to make campuses smoke free. He clarified that if approved, the motion would signal to the Board of Governors that GFC would like to see smoking prohibited on all university campuses. He pointed members to a supplementary document for GFC's consideration submitted by the University of Alberta Students' Union and invited the President of the Indigenous Students' Union (ISU), M. Moyan to present.

A Sharman and K Friese described the development of the proposal and the polemic nature of the discussion. M Moyan presented on behalf of the ISU Executive Team and Indigenous students on Campus. She described consultations and presented a statement on the proposal pointing members to the item in their materials. She expressed a hope that members would consider the impact on Indigenous students in enforcing a ban, and the symbolic importance of tobacco for Indigenous communities. She reminded members about the approval of *Braiding Past, Present and Future, the University of Alberta Indigenous Strategic Plan (Braiding)* and the goal to make safe spaces for Faculty, Staff and Community members and expressed an opinion that the proposal did not contribute to harm reduction or Reconciliation.

Members discussed:

- How a ban on students might impact Indigenous students who are using tobacco in symbolic ways;
- The impact on students who are immunocompromised;
- The Equity and Vaping Report, which shows evidence that students support the status quo;
- That the proposal originated with GFC and that the University had changed dramatically since 2018;
- That practices like Smudging are not protected by policy, and other implementation considerations;
- The lack of capacity within University of Alberta Police Service (UAPS) to enforce this policy and the ability for the university implement a ban;
- The health concerns of students;
- The possible impacts on Indigenous students on Campus;
- That the Graduate Students Association (GSA) does not support a full ban on smoking;
- Support for smoke free policies from the perspective of public health;
- That the motion before GFC was not a policy that was finalised but an opportunity to explore and develop the regulation and the possibility of being guided by *Braiding* and using a decolonised lens to support development;
- That co-creating a policy in the face of such a massive disagreement between faculty and students is problematic;
- An opinion that differentiating between commercial and ceremonial use of tobacco could be accomplished through education and a question of whether the UASU had consulted with Elders;
- The well documented harm of long term use of tobacco and the impact on members in the University community have asthmas and other long-term or chronic illnesses;
- A clarification that any policy developed would intentionally differentiate between ceremonial and commercial use of tobacco;
- The conflict with principles set out in the Scarborough Charter signed by the University of Alberta;
- Precedents from other smoke free universities that include details on accommodations for persons with disabilities and ceremonial use of tobacco products;
- That while universities may have implemented policies, doing so at the University would disregard the feelings of students and an opinion that this would not constitute leadership;
- That the motion was only a recommendation to the Board and that GFC could shape the policy;
- A consideration of the possible impact on the surrounding communities given there are few possible locations for designated smoking areas that avoid pathways and ventilation intakes on Campus;
- That we would only be accommodating 8% of the population if we don't approve a policy and that 92% of the population are experiencing harm;
- A consideration of differentiating Vaping which doesn't have the same impact on air quality;
- That implementing the ban would take important resources away from other initiatives;
- Impacts on staff smokers who will need to leave campus and whether it would be necessary to extend break times;
- A question of whether there was evidence that a smoking ban will reduce harm and an opinion that a policy that can't be implemented is not a policy at all;
- That the policy may be intended to promote harm reduction but that it would constitute a danger to smokers with mobility restraints who may potentially encounter obstacles leaving campus;
- An opinion that a ban would stigmatize people who smoke;
- A question of equity given that cannabis users have access to designated areas to protect non-smokers, and a comment that we treating one group differently; and
- Considerations for Augustana Campus where there are only two spaces for smokers.

THAT the General Faculties Council recommend that the Board of Governors direct university administration to develop a policy that prohibits smoking and vaping of all products on all university campuses with limited exceptions for ceremonial and medical use and that will designate spaces to accommodate those who live in campus residences.

FAILED

6. Faculty of Graduate Studies and Research (FGSR) Name Change

Presenter(s): Roger Epp, Interim Vice-Provost and Dean of FGSR

Discussion: R Epp presented the proposal and provided an explanation of the rationale behind it, namely a unit review where external reviewers had flagged the incongruence with the name of the faculty, given the services offered to post-doctoral students. He noted the proposed name change will make visible the important contribution of post-doctoral students and the role of the faculty in supporting them.

There was no discussion.

Motion: The motion was moved and seconded.

THAT the General Faculties Council approve, as recommended by the GFC Academic Planning Committee, the change of name from the Faculty of Graduate Studies and Research to the Faculty of Graduate and Postdoctoral Studies to take effect upon final approval.

CARRIED

DISCUSSION ITEMS

7. Update from the Vice-Provost of Equity, Diversity and Inclusion (no documents)

Presenter(s): Carrie Smith, Vice-Provost (Equity, Diversity, and Inclusion)

8. Council on Systemic Ableism (no documents)

Presenter(s): Hussain Alhussainy, Elected Student Member, Faculty of Arts; Carrie Smith, Vice-Provost (Equity, Diversity, and Inclusion; Danielle Peers, Associate Professor, Faculty of Kinesiology, Sport, and Recreation

H Alhussainy expressed his thanks to members of the Executive of the University of Alberta Students Union for their support and the members of the Council on Systemic Ableism. He introduced himself as a fourth year political sciences student in the Faculty of Arts and indicated that his research was focused on academic ableism. He began by observing that several groups are sidelined in the conversation on equity, diversity and inclusion. He reminded members that all universities are built on the foundation of eugenics and ableism and that the historical foundation of the university could be described as serving a function that was the exact opposite of an asylum, as it sought to exclude undesirable people from education. He stated that if the University is truly committed to inclusion, it must involve those students in the conversation and in the campus.

He highlighted four points that the University needed to address to counter systemic ableism:

- 1) Accommodations

He noted that the University's current system for processing accommodations removes the autonomy from the student by placing it within the Academic Success Centre. He provided additional context noting that a restricted list of disabilities is available and that students have to choose the accommodation that best describes their situation. He provided his own example, noting that for the past three years, he had requested a scribe and been denied for various reasons. These included various justifications ranging from protecting academic integrity, which he described as disrespectful to budgetary constraints, which conflict with the University's Duty to Accommodate. He noted that it was not until he met the current Dean of Students, that some of his needs began to be addressed but that in order for that to happen, he had to meet with a series of increasingly senior officials.

2) Access

Access is not just about student services but also the built environment including our facilities and buildings. He expressed a sense of sadness and shame that University infrastructure is not built to accommodate all students. He expressed support for efforts to retrofit buildings to fix issues that were created in the past but noted these fixes often can't solve the problem. He provided examples including steep inclines, small elevators, missing railings, and elevators without auditory services. He pointed to universal design elements which may not meet the needs of all communities, but are a good place to start. He concluded by emphasizing that consultation is essential to ensure that we do not implement retrofits that won't work for the unique needs of unique individuals.

3) Working on eliminating the ableist concerns on Campus and overall disability awareness:

He described the need to raise awareness of ableist exclusion for example, in events educating groups organising events in University spaces. He described the need to raise awareness of disabilities which is still viewed as a problem or medical abnormality that needs to be fixed when there is nothing wrong with individuals with disabilities. He emphasized the need to use a critical disabilities studies as a lens to change perspectives and provided some ideas such as incorporating content in course work or organising weeks to focus on disabilities. He encouraged groups on Campus that integrate ideas on feminism, critical race theory, or gender equality, to incorporate disability ways of thinking. He called upon GFC to and members of the University Community to expand the discussion and make room for individuals with lived experience to offer their unique perspectives rather than channeling a mainstream perception of what a human is or should be expected to do.

In conclusion, he called for a commitment from every faculty council, the Graduates' Students Association, the University of Alberta Students' Union, and the General Faculties Council to take into account accessibility concerns and the unconscious ableist policies that may still plague our campus. He called for a hub or a central group to lead coordination but reminded members that we all have the responsibility to make sure that our campuses are accessible. He expressed a hope that this would be the beginning of many campus initiatives.

D Peers noted that the experience of H. Alhussainy resonates with her experience but also with empirical research. She noted that the accommodation processes at the University lack transparency and a right-size approach, that requests are not dealt with in a timely manner and faculty and students are openly discouraged by faculty and staff to access supports. She reminded members that accommodations are not a service or a favour, but should be seen as a loophole for the University to continue to function with barriers in place for members of the community. She clarified that instead, the University must move towards a process that removes barriers and pointed to the work of research councils who are putting in place accountability mechanisms to encourage universities to put in place better systems. She described the work of the Council which is hoping to put in place a more proactive and systemic approach to consulting people as the university moves forward with initiatives.

C Smith acknowledged that members of the Council were in the room and observing and thanked them for being there. She described efforts of the Council to advise on policies, programs and structures that have an impact on everyone. She noted that the Council is working on Terms of Reference and working groups and that these groups are welcoming members. She described alignment between the Councils work and the Calls that had been powerfully articulated by H. Alhussainy including development of a Hub to move from an accommodations and actions approach; provision of access-resources and disability education; and coordination of action and services.

R Sanghera reflected that the approach to removing barriers should be systemic and described the commitment to advance this work and to engage different voices.

The Chair thanked H Al Hussainy for sharing his insights and members asked about translation and American Sign Language interpretation services offered within the community.

9. Question Period
10.1 - Question and Response on Campus Saint-Jean

Presenter(s): Bill Flanagan, President and Vice-Chancellor, and Chair of GFC

Questions were deferred.

INFORMATION REPORTS

- 11 Report of the GFC Executive Committee
- 12 Report of the GFC Academic Planning Committee
- 13 Report of the GFC Programs Committee
- 14 Report of the GFC University Teaching Awards Committee
- 15 GFC Nominations and Elections- Current Vacancies
- 16 Information Items:
 - A. Truth and Reconciliation Report to Community (TRC) Dashboard
 - B. Facilities Update
 - C. 2024-2025 Academic Schedule
- 17 Information Forwarded to GFC Members Between Meetings
UAlberta Email - Seeking the next U of A Chancellor!

CLOSING SESSION

- 18 Adjournment
Next Meeting of General Faculties Council: November 20, 2023

<u>ATTENDEES</u> Bill Flanagan (Chair) Verna Yiu (Vice-Chair) Noor Abdelwahab Simaan AbouRizk Seun Akinfolarin Hussain Alhussainy Layla Alhussainy Declan Ali Pedro Almeida Chris Andersen Damon Atwood Bishoi Aziz Jill Bagwe Quinn Benders Barbara Billingsley Stanford Blade Marsha Boyd Jennifer Branch-Mueller Heather Bruce Jessica Butts Scott Jason Carey Susan Chatwood Odile Cisneros Gavin Clark Greta Cummings Chathuranga De Silva Bipro Dhar Stephanie Dickie Ryan Dunch Duncan Elliott Roger Epp Carlos Fernandez-Patron Richard Field Shawn Flynn Kyle Foster Christian Fotang Zachary Friggstad Megan Garbutt Kenneth Garipey Julianne Gibbs-Davis Todd Gilchrist Douglas Gingrich Eva Glancy Douglas Gleddie Taylor Good Shubham Goswami Goswami Lise Gotell Michael Griffiths Jodi Harding-Kuriger Brenda Hemmelgarn	Michael Hendzel Tammy Hopper Tracy Howlett Jun Hu Christine Hughes Zak Kaal Matina Kalcounis-Rueppell Esther KimTim Klassen Julia Kloet Valentina Kozlova Vadim Kravchinsky Adrian Lam Corrine Langinier Pierre Lemelin Liran Levin Ola Mabrouk Elan MacDonald Nikolai Malykhin Shivani Mandal Andrew McGee Danielle Milln Aamir Mohamed Weimin Mou Jennifer Passey Nathan Perez Sujata Persad Elena Posse de Chaves Spencer Proctor Kyra Pyke Muneeba QaDir Bassem Raad Tracy Raivio Christian Reyns-Chikuma Aminah Robinson Fayek Norma Rodenburg Kent Rondeau Ravina Sanghera Mikael Schmidtke Andrew Sharman Patricia Sherbaniuk Allison Sivak Chris Sprysak Tom Stelfox Gordon Swaters Frederick Tappenden Nathan Thiessen Demetres Tryphonopoulos John Ussher Dilini Vethanayagam Marvin Washington Lindsey Westover	Shauna Wilton Robert Wood Tuesday Young <u>REGRETS:</u> Adetola Adesida Sandeep Agrawal Wajid Ali Saadet Andrews Gabriel Ayoku Angelina Botros Ahmed Bouferguene Marie Carrière Sharon Compton Jency Chhaiya Pierre Chue Chetan Dave Bailey Dickie Carol Hodgson Birkman Maesha Elm Elahi Ivan Fair Magda Grzeszczuk John Hu Jelena Holovati Jeff Johnson Rija Kamran Sandeep Kumar Denise LaFitte Jinfeng Liu Christopher Lupke Vikas Mehrotra Divya Maisuriya Precious Majekodunmi Jun Ming Hu Olena Mykhailenko Pauline Paul Graham Pearson Stephen Raitz Dan Romanyk Aiman Saif Sophie Shi John Spence Reagan Tremblay Aditya Tutika Minn-Nyoung Yoon Yifeng Wei Richard Wozniak <u>Governance Staff:</u> John Lemieux, University Secretary Kate Peters, GFC Secretary, Scribe Faiza Billo Erin Plume Juli Zinkin
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New Members of GFC

MOTION: TO APPOINT:

The following undergraduate student representatives to serve on GFC for terms commencing immediately and ending April 30, 2024:

Katherine Tamsett, Faculty of Agricultural, Life and Environmental Sciences
Harvir Sandhu, Faculty of Arts
Minhaal Akbar, Faculty of Arts
Alyssa Burant, Faculty of Business

ITEM NO. 5**Decision** ☒ **Discussion** ☐ **Information** ☐

DATE	November 20 th , 2023
TO	General Faculties Council
RESPONSIBLE PORTFOLIO	Faculty of Graduate and Post-doctoral Studies

MOTION:

THAT General Faculties Council approve the changes to regulations regarding Graduate Student time in program while on leave, for implementation upon final approval, and inclusion in the 2024-2025 Calendar.

EXECUTIVE SUMMARY:

The proposal contains additions to the Calendar sections that outline time limits to completion for graduate programs. These changes account for two scenarios that affect these limits: regular leave and withdrawal/lapsed program. These changes are proposed for the sake of clarity and to reduce ambiguity.

In the first case, information about regular leaves and time in program is included in the Calendar section on approved leaves of absence. It should also be addressed here, since other kinds of leave of absence are mentioned.

In the second case, this change makes clear what happens when a student has continued to work on their program while not enrolled, either due to accidentally allowing the program to lapse or doing it intentionally as a way of stopping the clock. Withdrawing to prolong the time allowed to complete the program, while continuing to work on it, is not the correct way to add time to the clock. This is the purpose of program extensions and leaves of absence.

This is largely clarification for a small subset of graduate students and programs among whom ambiguity in the Calendar has caused confusion.

Supporting Materials:

1. Calendar Change Request - FGSR Time in Program While on Leave



ITEM NO. 5

SCHEDULE A:

Engagement and Routing

Approval Route:

- GPST - March 27, 2023
- PRC - April 6, 2023
- FGSR Council - May 31, 2023 (Discussion)
- FGSR Council - September 13, 2023
- Programs Committee - TBD
- GFC - TBD

Faculty (& Department or Academic Unit):	FGSR
Contact Person:	Andrea Riewe / Roger Epp
Level of change: (choose one only)	☐ Undergraduate ☒ Graduate
Type of change request: (check all that apply)	☐ Program ☒ Regulation
For which term is this intended to take effect?	Fall 2023
Does this proposal have corresponding course changes? (Should be submitted at the same time)	No

Rationale

Things to consider (maximum 500 words): Why is this being changed; How will it benefit students/department/unit; How is this comparable to similar programs (internal or external); Historical context; Impacts to administration or program structure; Consultation with stakeholders

The proposed changes are intended to reduce ambiguity around whether a student's time away from program when they withdraw or allow their program to lapse is counted towards the total allowable time in program.

Calendar Copy

URL in current Calendar (or "New page") Maintenance of Registration: https://calendar.ualberta.ca/content.php?catoid=36&navoid=11205#maintenance-of-registration	
Current Copy: Removed language	Proposed Copy: New language
Maintenance of Registration	Maintenance of Registration [re-ordered] Students who fail to keep their program registration active as described below will be considered to have withdrawn from their program. If a student has withdrawn from their program or let their program lapse, and then returns to their program, the time away does not count towards their time limit to complete their program. (See: Time Limit for Completion of Graduate Programs). Students who have withdrawn or let their program lapse are not entitled to use university resources, and do not maintain their research ethics approval, (see: Failure to Maintain Active Registration). Course-based Programs: In order to keep their program active, students in course-based degree programs must register in and successfully complete a minimum of 3 units

Course-based Programs: In order to keep their program active, students in course-based degree programs must register in and successfully complete a minimum of 3 units of course weight of coursework for at least one term in each September to August period. Other registration patterns for students in exceptional circumstances will be considered by the Faculty of Graduate Studies and Research. Students who fail to keep the program active as described above will be considered to have withdrawn from their program. Thesis-based Programs (Admitted prior to Fall 2011): In order to keep their program active, students in thesis-based master's and doctoral programs admitted prior to Fall 2011 must register each year in the Fall and Winter Terms. Students who have registered in Fall and Winter Terms and are working only on thesis research during May through August do not need to register for the Spring and Summer Terms. Other registration patterns for students in exceptional circumstances will be considered by the Faculty of Graduate Studies and Research. Students who fail to keep the program active as described above will be considered to have withdrawn from their program. Thesis-based Programs (Admitted Fall 2011 and thereafter): In order to keep their program active, students in thesis-based master's and doctoral programs admitted in Fall 2011 and thereafter must register each year in each consecutive term (Fall, Winter, Spring and Summer). Other registration patterns for students in exceptional circumstances will be considered by the Faculty of Graduate Studies and Research. [re-ordered] Students who fail to keep the program active as described above below will be considered to have withdrawn from their program. [...]	of course weight of coursework for at least one term in each September to August period. Other registration patterns for students in exceptional circumstances will be considered by the Faculty of Graduate Studies and Research. Students who fail to keep the program active as described above will be considered to have withdrawn from their program. Thesis-based Programs (Admitted prior to Fall 2011): In order to keep their program active, students in thesis-based master's and doctoral programs admitted prior to Fall 2011 must register each year in the Fall and Winter Terms. Students who have registered in Fall and Winter Terms and are working only on thesis research during May through August do not need to register for the Spring and Summer Terms. Other registration patterns for students in exceptional circumstances will be considered by the Faculty of Graduate Studies and Research. Students who fail to keep the ir program registration active as described above will be considered to have withdrawn from their program. Thesis-based Programs (Admitted Fall 2011 and thereafter): In order to keep their program active, students in thesis-based master's and doctoral programs admitted in Fall 2011 and thereafter must register each year in each consecutive term (Fall, Winter, Spring and Summer). Other registration patterns for students in exceptional circumstances will be considered by the Faculty of Graduate Studies and Research. [...]
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Time Limit for Completion of Graduate Programs

The time limit (or the maximum period of time permitted to complete the requirements for a degree) is calculated from the start of the term in which the student first registers in that specific program or, if changing program category from another program, the start of the first term of the first program.

Any time spent registered in Maintaining Registration ([M REG 800](#)) is counted in the time limit for completion. Any time spent as a [qualifying graduate student](#) is not counted in the time limit for completion. The time limit for completion of the degree will be extended by the duration of any Faculty of Graduate Studies and Research (FGSR)-approved exceptional, parental or professional [leave of absence](#).

The time limit for completion of a thesis-based degree will be extended if a student has been registered as part-time status at any point in their program. See [Registration Status](#) for further information.

Thesis-based Master's: Candidates must complete their program within four years of the term in which they first register as candidates in the master's program. In the case of students transferring from a course-based or other program, the beginning of the program is the term of initial registration in the first program.

Course-based Master's: Course-based master's students have six years to complete their program unless the department has opted for a shorter time limit for its

Time Limit for Completion of Graduate Programs

The time limit (or the maximum period of time permitted to complete the requirements for a degree) is calculated from the start of the term in which the student first registers in that specific program or, if changing program category from another program, the start of the first term of the first program.

Any time spent registered in Maintaining Registration ([M REG 800](#)) is counted in the time limit for completion. Any time spent as a [qualifying graduate student](#) is not counted in the time limit for completion. The time limit for completion of the degree will be extended by the duration of any Faculty of Graduate Studies and Research (FGSR)-approved exceptional, parental or professional [leave of absence](#). **In contrast, the time away for a Faculty of Graduate Studies and Research (FGSR)-approved Regular leave of absence will be counted towards the time limit for completion.**

The time limit for completion of a thesis-based degree will be extended if a student has been registered as part-time status at any point in their program. See [Registration Status](#) for further information.

If a student has withdrawn from their program or let their program lapse, and then returns to their program, the time away does not count towards their time limit to complete their program. (See: Time Limit for Completion of Graduate Programs). However, students who fail to maintain active registration and then choose to return must apply for readmission, which is not guaranteed (See: [Readmission](#)). If they are readmitted, their time away may be counted towards their time limit for completion or an extension request may be required. (See: [Failure to Maintain Active Registration](#))

In instances where a student has been using University resources while withdrawn or in a lapsed program, FGSR may add appropriate registration and fees, and update time in program to include this period. This would result in the student having to pay full fees and would cost time in program.

Thesis-based Master's: Candidates must complete their program within four years of the term in which they first register as candidates in the master's program. In the case of students transferring from a course-based or other program, the beginning of the program is the term of initial registration in the first program.

Course-based Master's: Course-based master's students have six years to complete their program unless the department has opted for a shorter time limit for its

course-based master's program. In the case of students transferring from a thesis-based or other program, the beginning of the program is the term of initial registration in the first program. Consult the department listing in [Graduate Programs](#).

Doctoral degree: Candidates must complete their program within six years of the term in which they first register in a doctoral program. In the case of master's students who are reclassified as doctoral students, all degree requirements must be completed within six years of the time they first register as master's candidates.

Graduate diploma and graduate certificate: Candidates must complete all the requirements within four years of the time they first register in the graduate diploma or certificate program.

[...]

Failure to Maintain Active Registration

If students fail to maintain active registration, their program of study will be cancelled by FGSR (See [Maintenance of Registration and Time Limit for Completion of Graduate Programs](#)).

When a graduate student's program is cancelled, the student - supervisor/supervisory committee relationship is dissolved. Students without an active program are no longer entitled to supervisory advice/guidance/feedback on their program of study nor are supervisors and/or supervisory committee members required to provide it. Similarly, course based Master's students are not entitled to advice/guidance/feedback from program advisors.

Further, and where relevant, any data a student collects while unregistered as a graduate student cannot be used for the purpose of their own thesis research since ethics approvals lapse when program registration lapses.

Readmission

If a student intends to resume work on their program, they must apply for readmission and have their program reassessed in accordance with the regulations in force at that time. Readmission is not guaranteed. (See [Maintenance of Registration and Time Limit for Completion of Graduate Programs](#)). If a student is recommended for readmission by their department, the student will pay a readmission fee, which will be assessed in addition to standard program fees in effect at the time.

For thesis-based programs, when a student submits their request for readmission to complete their program, a request to reappoint the supervisor and reconstitute the

course-based master's program. In the case of students transferring from a thesis-based or other program, the beginning of the program is the term of initial registration in the first program. Consult the department listing in [Graduate Programs](#).

Doctoral degree: Candidates must complete their program within six years of the term in which they first register in a doctoral program. In the case of master's students who are reclassified as doctoral students, all degree requirements must be completed within six years of the time they first register as master's candidates.

Graduate diploma and graduate certificate: Candidates must complete all the requirements within four years of the time they first register in the graduate diploma or certificate program.

[...]

Failure to Maintain Active Registration

If students fail to maintain active registration, their program of study will be cancelled by FGSR (See [Maintenance of Registration and Time Limit for Completion of Graduate Programs](#)).

When a graduate student's program is cancelled, the student - supervisor/supervisory committee relationship is dissolved. Students without an active program are no longer entitled to supervisory advice/guidance/feedback on their program of study nor are supervisors and/or supervisory committee members required to provide it. Similarly, course based Master's students are not entitled to advice/guidance/feedback from program advisors.

Further, and where relevant, any data a student collects while unregistered as a graduate student cannot be used for the purpose of their own thesis research since ethics approvals lapse when program registration lapses.

Readmission

If a student intends to resume work on their program, they must apply for readmission and have their program reassessed in accordance with the regulations in force at that time. Readmission is not guaranteed. (See [Maintenance of Registration and Time Limit for Completion of Graduate Programs](#)). If a student is recommended for readmission by their department, the student will pay a readmission fee, which will be assessed in addition to standard program fees in effect at the time.

For thesis-based programs, when a student submits their request for readmission to complete their program, a

supervisory committee must also be submitted, and is subject to approval by the Dean, FGSR. Students who are readmitted for the purpose of completing their degree program must be registered full time until their final program requirement(s) are completed.	request to reappoint the supervisor and reconstitute the supervisory committee must also be submitted, and is subject to approval by the Dean, FGSR. Students who are readmitted for the purpose of completing their degree program must be registered full time until their final program requirement(s) are completed.
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Reviewed/Approved by:

GPST - March 27, 2023 PRC - April 6, 2023 FGSR Council - May 31, 2023 (Discussion) FGSR Council - September 13, 2023 Programs Committee - TBD GFC - TBD
OPTIONAL: Other internal faculty approving bodies, consultation groups, or departments, and approval dates.

ITEM NO. 7**Decision** ☒ **Discussion** ☐ **Information** ☐

ITEM OBJECTIVE: To share the Student Experience Action Plan- themes, goals, and key actions with the General Faculties Council for discussion and endorsement.

DATE	November 20 th , 2023
TO	General Faculties Council
RESPONSIBLE PORTFOLIO	Provost and Vice-President (Academic) Project Co-Sponsors are the Students' Union, Graduate Students' Association, the Deputy Provost, Students & Enrollment, and the Associate Dean, Education, the Alberta School of Business

MOTION: THAT General Faculties Council endorse the Student Experience Action Plan Themes and Goals and key actions, as described in attachments.

EXECUTIVE SUMMARY:Background

Since January 2023, the Student Experience Action Plan (SEAP) has engaged deeply (over 100 engagements, including a student validation survey with over 8000 responses) with U of A students, staff, and faculty to understand what aspects of student experiences are exceptional and where we need to improve, as our student enrollment grows to 60,000. Guided by a joint sponsorship model with representation from the Students' Union, the Graduate Students' Association, the Deputy Provost, Students and Enrollment, and Faculty, the SEAP used co-creation to engage with our communities to listen and uplift the voices and aspirations of our diverse student body. The SEAP co-created a set of student-centered principles, a set of commitment statements, and 54 actions that are nested within seven thematic areas. As an action plan, the SEAP will operationalize and deliver on the University Strategic Plan's commitments outlined in *Education with Purpose*. The SEAP and its accountability framework highlight concrete actions and an increased level of intentionality that will ensure the U of A is embedding student experience data and student voices. Through the SEAP students will have a rich environment in which to shape their time at the U of A and next steps after graduation.

Throughout the co-creation process we have relied on a number of principles to inform our approach: inclusion and diversity, iterative process with open minds, transparency, honesty, and respect, shared accountability, and visible learning.

The SEAP is a "living plan" and the plan's launch will kick off "living implementation" which recognizes that as student-needs evolve, the SEAP will need to be responsive and we will iterate as needed. The commitment to creating the SEAP is a commitment to both current and future U of A students.

Next Steps

Following endorsement the SEAP will finalize the accountability framework and plan for implementation, after its formal launch in January 2024.

Supporting Materials:

[Student Experience Action Plan Overview](#)

[Student Experience Action Plan Appendix - summary of goals and actions](#)

[Draft Accountability Framework](#)

***See Schedule A for additional items to include if needed.**

SCHEDULE A:

Engagement and Routing

Consultation and Stakeholder Participation / Approval Route (parties who have seen the proposal and in what capacity) <[Governance Resources Section Student Participation Protocol](#)>

Those who are actively *participating*:

- Between January and September 2023 the SEAP has held over 100 engagement sessions to co-create the action plan. These engagements include:
 - 36 student and student group engagements
 - 35 Faculty and staff engagements
 - 7 Meetings with University Governance
 - 20 meetings with units to develop goals and actions
 - 2 Engagements with alumni and admitted students
 - 1 Talking Circle with Black, Indigenous, and Persons of Colour
 - 3 Co-creation Workshops
 - 4 SEAP Support Team Meetings (this committee is comprised of students, student representatives, faculty members, staff, and senior leaders)
 - 10 student Advisory Committee engagements
 - 1 Senior Leadership retreat

Those who have been *consulted*:

- Student Service Staff survey
- Faculty member feedback form
- Student validation survey (8,092 responses, 19% response rate)
- Group visits - Faculty councils, Deans' councils, student meetings, etc.
- Open shareback sessions
- Statutory Deans' Council - November 1, 2023



ITEM NO. 7

Those who have been **informed**:

-

Governance Route:

COSA - November 2, 2023 - for endorsement
GFC - November 20th, 2023 - for endorsement
BLRSEC - November 24, 2023 - for discussion

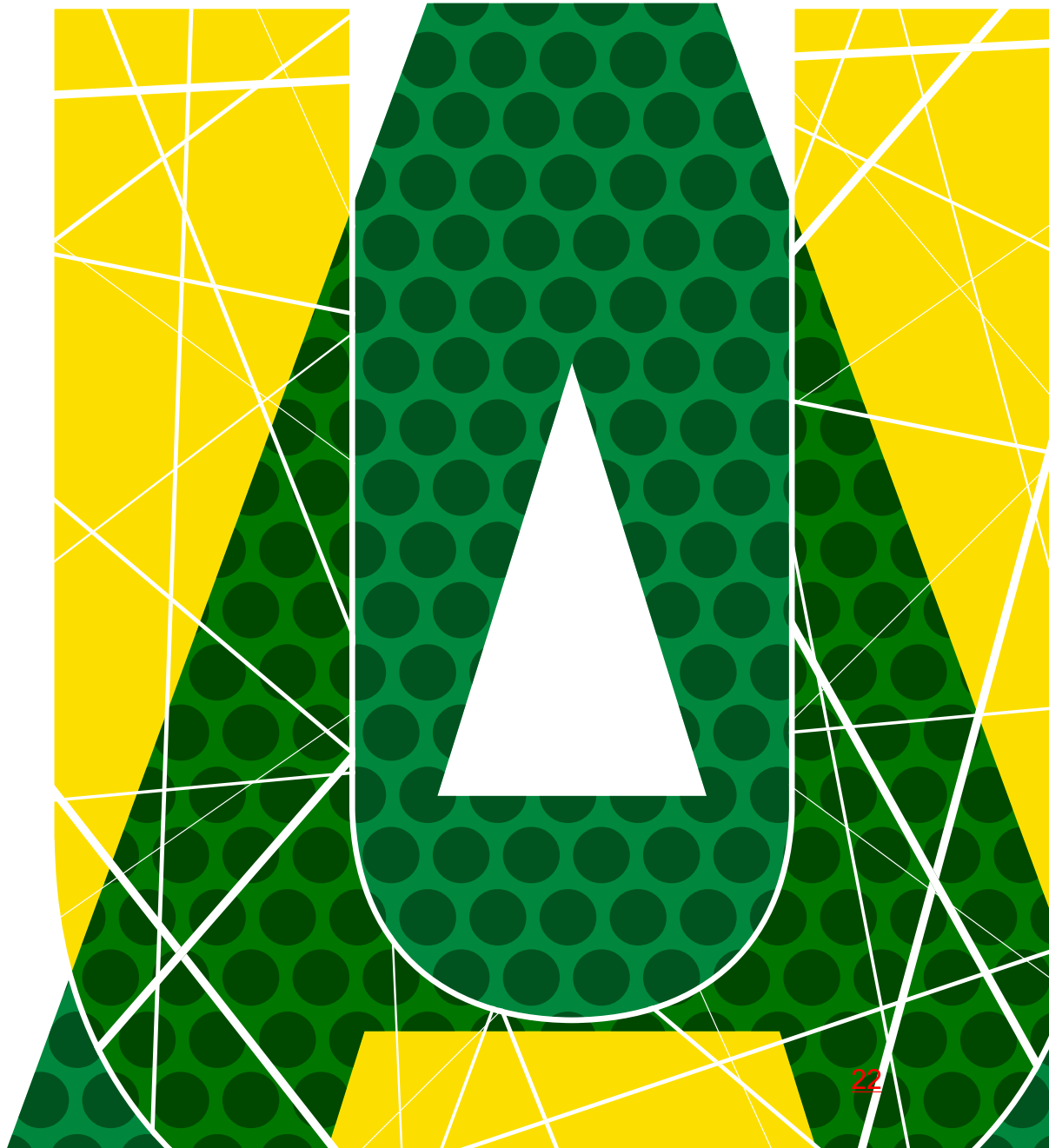
Supplementary Notes / Context:

Appendix

Student Experience Action Plan Overview



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STUDENTS TOLD US WHAT MATTERS TO THEM

Student-Centered Themes

We recognize that within these goals, student experiences vary, and for some students, exceptional experiences are only attained after systemic barriers to equity are addressed.

Theme #1: Creating Safe, Accessible, and Beautiful Campuses

The U of A should be a leader in accessibility. Students’ unique recreational, emotional, spiritual and educational needs must be considered in order for them to achieve physical, psychological and cultural safety and reach their full potential. This includes clean, accessible spaces and learning environments on all campuses, in addition to accommodations that remove barriers.

GOALS	ENABLERS/KEY ACTIONS
• Work to eliminate discriminatory barriers to create accessible and responsive environments where all students can meaningfully participate. • Support learning and participation for all students by maintaining consistent care, cleanliness and renovation of buildings, furniture and outdoor spaces prioritizing accessibility, sustainability and functionality. • Commit to a community-centered and equity-informed approach to improving safety for all students on all campuses.	1. Implement recommendations to address student accessibility arising from work of the Council on Systemic Ableism to remove discriminatory barriers from all U of A learning environments. 2. Improve the student accommodation process by embedding the responsibility of accessibility and accommodation into all levels of the organization and clearly articulate a strong understanding of the roles and responsibilities for instructors, students and staff. 3. Increase the awareness and availability of flexible spaces that students can use to meet their various needs (e.g., spaces to breastfeed, practice their faith, etc.). 4. Seek new institutional funding to raise the University’s Association of Physical Plant Administrators (APPA) standard of cleanliness from level 4 to level 3 or higher (ATB) by 2025.

Theme #1: Creating Safe, Accessible, and Beautiful Campuses *cont'd*

The U of A should be a leader in accessibility. Students’ unique recreational, emotional, spiritual and educational needs must be considered in order for them to achieve physical, psychological and cultural safety and reach their full potential. This includes clean, accessible spaces and learning environments on all campuses, in addition to accommodations that remove barriers.

GOALS	ENABLERS/KEY ACTIONS
• Work to eliminate discriminatory barriers to create accessible and responsive environments where all students can meaningfully participate. • Support learning and participation for all students by maintaining consistent care, cleanliness and renovation of buildings, furniture and outdoor spaces prioritizing accessibility, sustainability and functionality. • Commit to a community-centered and equity-informed approach to improving safety for all students on all campuses.	5. Situate student voices and experiences in the implementation of all safety initiatives by implementing the key actions of the University of Alberta Safety and Security Committee’s 2023 Security Report that is guided by a holistic approach to security and public safety. 6. Take holistic, complementary and multi-pronged approaches to improve safety and security, including: a. Recognize the critical link between safety and relationships, connection and belonging by incorporating relational pathways (i.e. regular listening circles) that create conditions for a supportive and vibrant learning environment. b. Support initiatives under the Culture of Care that acknowledge the interconnectedness of students, faculty and staff in creating a safe workplace that leads to a safe learning environment for students.

Theme #2: Enabling Academic Agency and Flexibility

Flexible learning environments are increasingly valuable for students. By providing opportunities for students to exercise more agency in their learning journey, the university can demonstrate it hears, understands and supports the needs of the modern student. Students also want proactive academic advising in order to make informed decisions, streamline their academic journey and facilitate the alignment of their varied academic and personal goals.

GOALS	ENABLERS/KEY ACTIONS
• Encourage students with proactive, holistic advising to facilitate their academic journey and pursuit of individual goals. • Excel in experiential learning, including robust research opportunities, by partnering with communities to expand safe, accessible and supported opportunities for student participation. • Support and increase students' agency to design and direct their learning by providing various academic programming and scheduling options within a responsive learning environment.	1. Implement a tool ("My Schedule Builder") that will support students to more easily build class schedules that align with program requirements and balance their co-curricular and extra-curricular activities. 2. Implement a syllabus management tool that will ensure syllabi are provided in a consistent way and format to effectively communicate course expectations, learning objectives, assignments, and deadlines to students. Additionally, ensure that students have access to past syllabi prior to registration to aid in their decision making. 3. Proactively provide students with information regarding their program and degree requirements in a way that is easily understandable and accessible. 4. Continue to improve upon the provision of research opportunities in an equitable and accessible way for undergraduate and graduate students in alignment with the Institutional Strategic Plan for Research and Innovation to foster scholarly skill development relevant to multiple disciplines. 5. Increase awareness and usage of the online platform (campusBRIDGE) for students and alumni to access work experiential learning, and research opportunities. 6. Promote experiential learning (EL) opportunities through central structures (e.g., Go Abroad, Undergraduate Research Initiative, Career Centre) and unit-specific activities (faculty-specific work, integrated learning), and provide support for students to understand the benefits and pathways to integrating EL into their academic program. 7. Establish shared definitions to distinguish the various delivery modes for online learning, empowering students to make informed scheduling decisions.

Theme #2: Enabling Academic Agency and Flexibility *cont'd*

Flexible learning environments are increasingly valuable for students. By providing opportunities for students to exercise more agency in their learning journey, the university can demonstrate it hears, understands and supports the needs of the modern student. Students also want proactive academic advising in order to make informed decisions, streamline their academic journey and facilitate the alignment of their varied academic and personal goals.	
GOALS	ENABLERS/KEY ACTIONS
• Encourage students with proactive, holistic advising to facilitate their academic journey and pursuit of individual goals. • Excel in experiential learning, including robust research opportunities, by partnering with communities to expand safe, accessible and supported opportunities for student participation. • Support and increase students' agency to design and direct their learning by providing various academic programming and scheduling options within a responsive learning environment.	8. Complement in-person learning with online purpose-built learning delivered in bichronous, asynchronous, synchronous, and blended/hybrid modalities to enable mixed-modality scheduling to support student flexibility and agency. 9. Develop and expand purpose-built online course and program options that provide new learning opportunities to current and future students. 10. Audit and uplift existing online courses to focus on best practices in online learning pedagogy and accessibility. 11. Implement a renewed learning management system (LMS) to support on-campus and online learning. 12. Increase awareness of and access to flexible space on campus that is suitable for online learning.

Theme #3: Fostering a Student-Centered Learning Environment

To meet the evolving needs of students, we must put them at the heart of all we do. This includes prioritizing exceptional student experiences, encouraging a culture of learning and development and using the most current student experience data available to guide decision-making across the institution.

GOALS	ENABLERS/KEY ACTIONS
• Celebrate a student-centered culture that listens to students as members of the community and prioritizes exceptional student experiences at all levels of the university. • Encourage a culture of learning and development that educates staff and faculty in ways that continually enhances their ability to create conditions where students can foster connections, engage in opportunities for exploration and be successful in addressing challenges. • Commit to a culture that is informed by different types of student experience data that guides decisions and ongoing improvements to student programs, services and resources.	1. Strive to maximize diverse student participation, feedback and experiences in all programs, services and initiatives that impact students. 2. Intentionally design and choose methods of student consultation that invite the highest level of participation possible. 3. Prioritize a student-centered approach to how we organize and communicate information on all platforms (e.g., websites, Bear Tracks, eClass, etc.). 4. Offer and promote regular and accessible professional development and training opportunities for staff and faculty that enhance education and understanding around diverse student experiences, future-focused programs and services and healthy workplace cultures. 5. Offer regular opportunities for staff and faculty to learn about the different programs and services within the student services ecosystem that also foster relationships across units and ensure exceptional service to students. 6. Intentionally highlight and celebrate contributions and successes that enhance students' experiences (e.g., awards, profiling initiatives, etc.). 7. Establish clear student experience performance indicators and develop an assessment approach that focus on the top drivers of positive student experiences, informed by current data and understandings of multiple student experiences. Develop clear accountabilities for this work. 8. Engage in integrated enrolment planning to develop a roadmap that thoughtfully considers and guides how student programs and services are scaled to respond to the enrolment growth targets of 60,000 students by 2033. 9. Establish a "one university" approach to sharing the student experience-related enhancement initiatives that are planned and executed throughout the university.

Theme #4: Prioritizing Student Success

Students deserve a seamless and intuitive experience to locate, learn and access student support services regardless of their experience in higher education or previous knowledge. This includes mental health supports tailored to the unique context and needs of each student. Putting students' holistic wellbeing front and center today sets them up for personal, academic and professional success tomorrow.

GOALS	ENABLERS/KEY ACTIONS
• Nurture a learning environment that uplifts, cares for and empowers students based on their unique context and needs, while prioritizing balance, health, and well-being. • Provide seamless and intuitive resources so all students, regardless of their previous knowledge or experience with higher education, can easily access and navigate the information and services they need. • Ensure students' academic interests and challenges are supported by all members of the university community to foster agency and responsibility.	1. Implement the recommendations and actions identified in the U of A's Action Plan for the National Standard for Mental Health and Well-Being for Post-Secondary Students. 2. Improve availability and access to a continuum of mental health and wellness supports that are diverse and culturally appropriate. 3. Invest in Counselling and Clinical Services to enhance access for all students by increasing the number of clinicians along with the adoption of a new stepped care model. 4. Implement the Inkblot Student Assistance Program at Augustana to provide students with access to a wide range of mental health practitioners. 5. Ensure all student support services are accessible and approachable through a transparent process of continuous improvement. 6. Improve communications (specifically webpages) to ensure optimal accessibility, accuracy and navigability of student-related information. 7. Ensure "How To Help" resources for faculty and staff are proactively provided and available. 8. Increase awareness and access to academic support services for all students.

Theme #5: Relationships, Connection and Belonging Matter

The U of A has an incredible community spirit and solid foundation on which to build even more impactful opportunities for students to experience a strong sense of belonging. By intentionally investing in initiatives that foster community, we will provide opportunities for students to feel at home and flourish.

GOALS	ENABLERS/KEY ACTIONS
• Strive to provide an abundance of diverse curricular and extracurricular opportunities for students to meaningfully connect with members of the university community, along with local and global communities. • Develop welcoming services, facilities and engaging events that create a sense of enjoyment on campus, where students can interact, build meaningful relationships and foster a close-knit and lively on-campus community.	1. Host regular, broadly inclusive events that facilitate inter-campus connection. 2. Continue to improve the accessibility and inclusivity of all events by developing university-wide strategies to support events at local and institutional levels. 3. Promote small to medium sized opportunities that facilitate meaningful connections for students to connect with peers and faculty members (instructors) both within their program/faculty as well as across disciplines. 4. Support student clubs in meaningful and tangible ways. 5. Streamline student group administration by transitioning student administrative processes, including the review of proposed events, from the university to the Students' Union. 6. Ensure all students have the opportunity for an international experience during their university journey. 7. Continue building connections between all campuses, keeping in mind the unique needs of Campus Saint-Jean and Augustana students. 8. Explore ways to address the transportation gap for students traveling between Camrose and Edmonton.

Theme #6: Supporting Transitions Into and Out of Study

Students ask the U of A to deliver wrap-around services that support their skills, knowledge, experiences and connections as they confidently transition into university and manage their careers upon graduation. They need to be informed about the decisions they are making, fully understanding each choice along their academic journey through to graduation.

GOALS	ENABLERS/KEY ACTIONS
• Create opportunities for all prospective and incoming students to connect with the university to learn more about how best to prepare for their student experience at the U of A based on their individual needs. • Increase the degree to which students feel connected to the U of A by cultivating an environment that fosters a sense of belonging for all students from admission to graduation. • Empower students to develop the skills, knowledge, experiences and connections they need to confidently manage their next steps after university, future academic goals and careers.	1. Develop a “one university” orientation experience that integrates existing and specialized orientation and transition programming within a holistic curriculum to support student success. 2. Develop new and enhance existing strategies to foster a sense of connection for students in the first six to nine weeks of their university journey that reflect evidence-informed best practice. 3. Establish strategies to support post-secondary transfer students and U of A students transitioning between years of study, including the progression from undergraduate to graduate studies. 4. Establish strategies to support student transition to improve retention, academic achievement, academic success, student engagement and career success, considering the specific needs of equity-denied students (Ex: the Campus Saint-Jean transition into post-secondary education program). 5. Establish a more robust “one university” approach to improve coordination, access to, and availability of career management services for all students.

Theme #7: The Importance of Transparent and Affordable Costs

The university needs to be transparent about how they are using money from students’ tuition and fees to demonstrate that post-secondary education at the U of A is a valuable investment. Students want to feel more considered, informed and part of the financial decisions the university is making.

GOALS	ENABLERS/KEY ACTIONS
• Increase transparency of the breakdown and utilization of student tuition and fees to illustrate the value of students’ investment in education. • Continue to practice responsible and effective stewardship of financial resources across the university in ways that prioritize student success.	1. Increase transparency of the breakdown of student tuition and fees by proactively communicating the information to students and stakeholders. 2. Ensure the ongoing review of financial support budgets to find ways to optimize the cost of student tuition and fees through the SEAP. 3. Develop and take actions to increase the affordability of class materials, including aiming to increase textbook affordability by having 35 percent of courses and class sections utilize the Zero Textbook Cost initiative by 2026. 4. Make financial literacy support and programming available to students.

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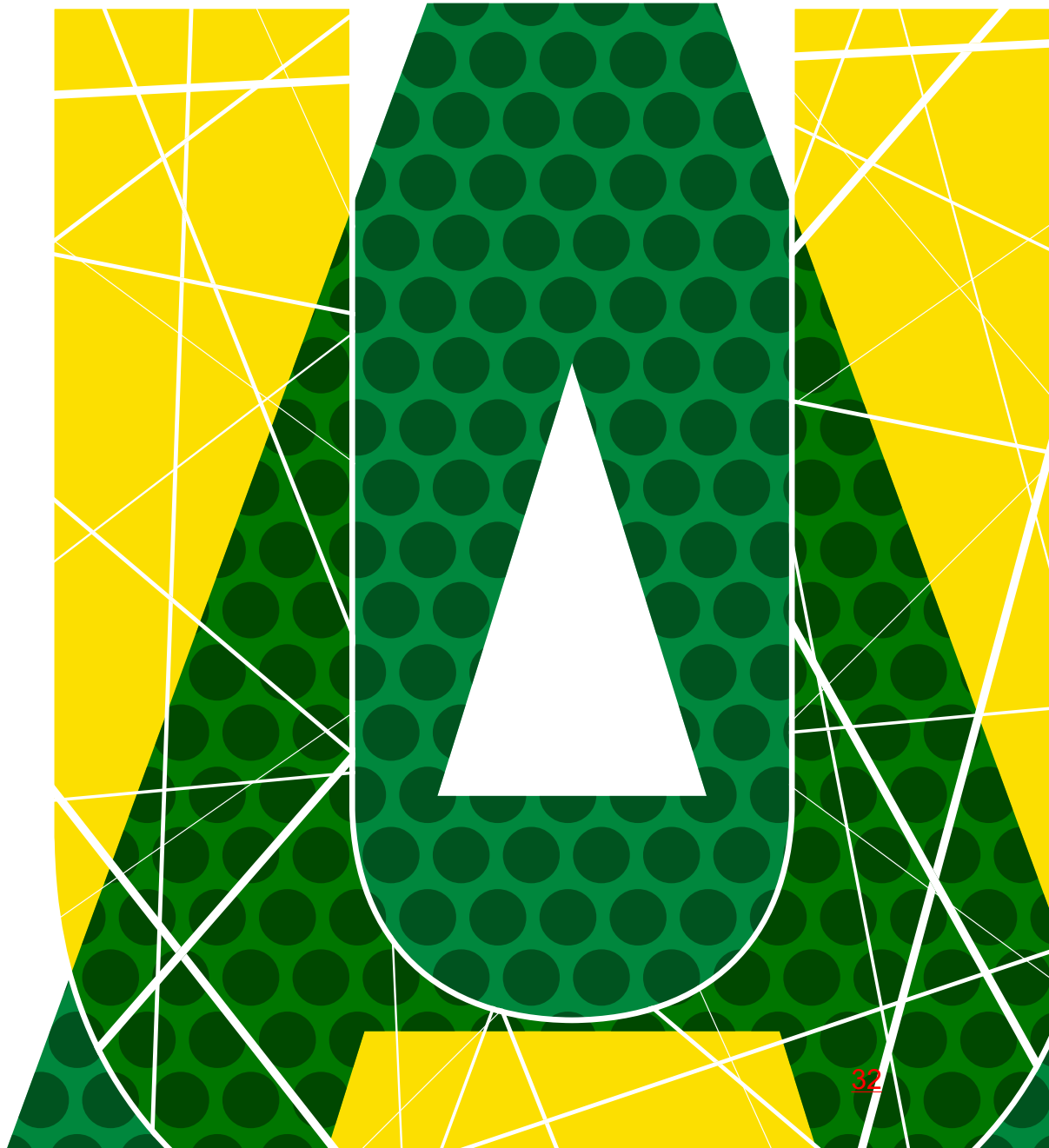
uab.ca/seap

2023-2026

Student Experience Action Plan Overview



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The Student Experience Action Plan (SEAP) was co-created with University of Alberta students, staff, faculty, and alumni through extensive engagement between January and August 2023. The plan outlines our commitment to students and our shared purpose and priorities in fostering an outstanding student experience. It will guide our efforts over the next three years to ensure our students are activated to learn, explore and pursue customized experiences during their university journey.

We held over **100 engagement sessions** with the university community between January and August 2023 which included a student survey yielding **over 8,000 responses**.

OUR VISION FOR THE STUDENT EXPERIENCE

As a student-centered community, we all **listen**, learn, and act to deliver exceptional student experiences.

OUR COMMITMENT TO THE STUDENT EXPERIENCE

Together, we nurture experiences where students explore and expand their knowledge, skills, and networks, connecting with local and global communities, to act with purpose.

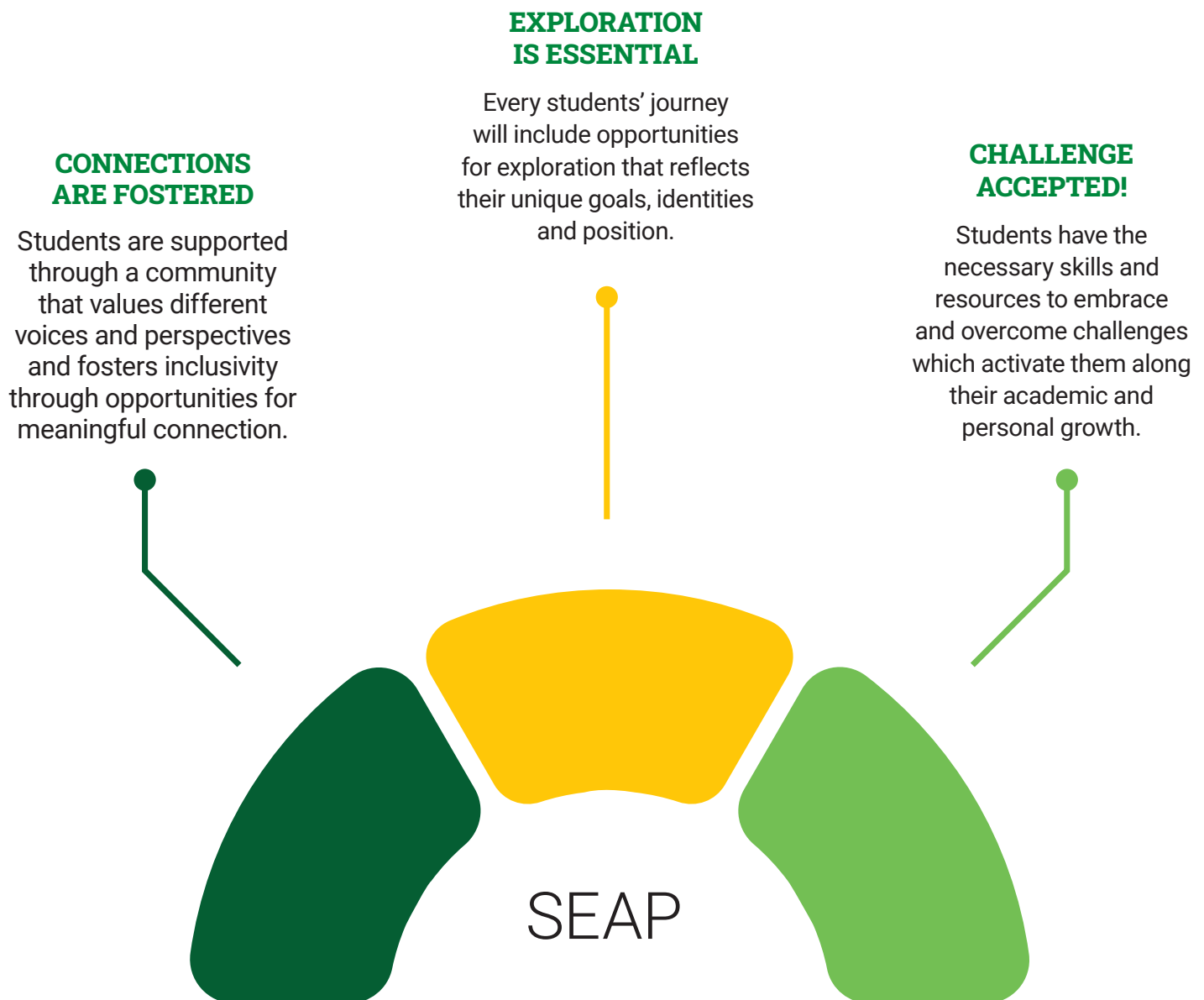
INDIGENOUS WORLDVIEW

We are all interrelated and interconnected, living, learning and working together for a balanced, supportive and healthy community with the land and with each other.

The Indigenous Worldview is a signature addition to the Student Experience Action Plan that goes beyond the inclusion of First Nations, Métis and Inuit peoples, and instead

provides a commentary on the vision for a healthy student experience from Indigenous perspectives. Through consultation with members of the campus community, including Indigenous leaders, the Indigenous Worldview affirms the vision and commitment of student experience through an Indigenous perspective familiar to those from Treaty 6, 7 or 8 territory and should resonate across cultures

WHAT CAN STUDENTS EXPECT FROM THEIR UNIVERSITY JOURNEY? Student-Centered Principles



STUDENTS TOLD US WHAT MATTERS TO THEM

Student-Centered Themes

We recognize that within these goals, student experiences vary, and for some students, exceptional experiences are only attained after systemic barriers to equity are addressed.

CREATING SAFE, BEAUTIFUL AND ACCESSIBLE CAMPUSES

The U of A should be a leader in accessibility. Students' unique recreational, emotional, spiritual and educational needs must be considered in order for them to achieve physical, psychological and cultural safety and reach their full potential. This includes clean, accessible spaces and learning environments on all campuses, in addition to accommodations that remove barriers.

Students advocate passionately for a community-centered approach to improve the physical, psychological and cultural safety and well-being of the university community on all campuses.

GOALS

- Work to eliminate discriminatory barriers to create accessible and responsive environments where all students can meaningfully participate.
- Support learning and participation for all students by maintaining consistent care, cleanliness and renovation of buildings, furniture and outdoor spaces prioritizing accessibility, sustainability and functionality.
- Commit to a community-centered and equity-informed approach to improving safety for all students on all campuses.

ENABLING ACADEMIC AGENCY AND FLEXIBILITY

Flexible learning environments are increasingly valuable for students. By providing opportunities for students to exercise more agency in their learning journey, the university can demonstrate it hears, understands and supports the needs of the modern student. Students also want proactive academic advising in order to make informed decisions, streamline their academic journey and facilitate the alignment of their varied academic and personal goals.

GOALS

- Encourage students with proactive, holistic advising to facilitate their academic journey and pursuit of individual goals.
- Excel in experiential learning, including robust research opportunities, by partnering with communities to expand safe, accessible and supported opportunities for student participation.
- Support and increase students' agency to design and direct their learning by providing various academic programming and scheduling options within a responsive learning environment.

FOSTERING A STUDENT-CENTERED LEARNING ENVIRONMENT

To meet the evolving needs of students, we must put them at the heart of all we do. This includes prioritizing exceptional student experiences, encouraging a culture of learning and development and using the most current student experience data available to guide decision-making across the institution.

GOALS

- Celebrate a student-centered culture that listens to students as members of the community and prioritizes exceptional student experiences at all levels of the university.
- Encourage a culture of learning and development that educates staff and faculty in ways that continually enhances their ability to create conditions where students can foster connections, engage in opportunities for exploration and be successful in addressing challenges.
- Commit to a culture that is informed by different types of student experience data that guides decisions and ongoing improvements to student programs, services and resources.

PRIORITIZING STUDENT SUCCESS

Students deserve a seamless and intuitive experience to locate, learn and access student support services regardless of their experience in higher education or previous knowledge. This includes mental health supports tailored to the unique context and needs of each student. Putting students' holistic wellbeing front and center today sets them up for personal, academic and professional success tomorrow.

GOALS

- Nurture a learning environment that uplifts, cares for and empowers students and considers their unique context and needs where balance, health and well-being are prioritized.
- Provide seamless and intuitive resources so all students, regardless of their previous knowledge or experience with higher education, can easily access and navigate the information and services they need.
- Ensure student's academic interests and challenges are supported by all members of the university community, fostering agency and responsibility in them.

RELATIONSHIPS, CONNECTION AND BELONGING MATTER

The U of A has an incredible community spirit and solid foundation on which to build even more impactful opportunities for students to experience a strong sense of belonging. By intentionally investing in initiatives that foster community, we will provide opportunities for students to feel at home and flourish.

GOALS

- Strive to provide an abundance of diverse curricular and extracurricular opportunities for students to meaningfully connect with members of the university community, along with local and global communities.
- Develop welcoming services, facilities and engaging events that create a sense of enjoyment on campus, where students can interact, build meaningful relationships and foster a close-knit and lively on-campus community.

SUPPORTING TRANSITION INTO AND OUT OF STUDY

Students ask the U of A to deliver wrap-around services that support their skills, knowledge, experiences and connections as they confidently transition into university and manage their careers upon graduation. They need to be informed about the decisions they are making, fully understanding each choice along their academic journey through to graduation.

GOALS

- Create opportunities for all prospective and incoming students to connect with the university to learn more about how best to prepare for their student experience at the U of A based on their individual needs.
- Increase the degree to which students feel connected to the U of A by cultivating an environment that fosters a sense of belonging for all students from admission to graduation.
- Empower students to develop the skills, knowledge, experiences and connections they need to confidently manage their next steps after university, future academic goals and careers.

THE IMPORTANCE OF TRANSPARENT AND AFFORDABLE COSTS

The university needs to be transparent about how they are using money from students' tuition and fees to demonstrate that post-secondary education is a valuable investment. Students want to feel more considered, informed and part of the financial decisions the university is making.

GOALS

- Increase transparency of the breakdown and utilization of student tuition and fees to illustrate the value of students' investment in education.
- Continue to practice responsible and effective stewardship of financial resources across the university in ways that prioritize student success and resources.



HOW WILL WE GET THERE?

The successful implementation of the Student Experience Action Plan (2023-2026) is a coordinated effort, with shared responsibilities across the university community, to deliver on our commitment of Education with Purpose where all students have exceptional experiences and benefit from a student-focused culture. While we will focus on key goals and actions over the next three years, the SEAP is about our ongoing commitment to strengthen the student experience and ensure all students are equipped with the tools they need to make a difference in the world and take on the challenges around them.

As a community, we will hold ourselves accountable for what is outlined in this plan, and we will share the successes and challenges with the U of A community through annual reports. These will provide a mechanism through which we can track our progress and highlight our success. We will ensure continued alignment with the University Strategic Plan over the next ten years, including measuring key indicators that relate to student priorities now, and over time.

Individuals and U of A communities will be encouraged to demonstrate their commitment to the Plan and to the U of A student experience by signing a Charter and engaging in implementation activities.

While the Deputy Provost, Students and Enrolment, will lead some of the goals and activities outlined in the plan, many of the initiatives will be embedded by colleges, faculties and other university partners. The **University Strategic Plan**, the **Indigenous Strategic Plan**, the **Strategic Plan for Equity, Diversity and Inclusivity** and the Accountability Framework are institutional commitments and are especially interlinked with the Student Experience Action Plan.

FOR MORE INFORMATION

The full action plan will be available in January 2024 at uab.ca/seap.

Leading with Purpose.



**UNIVERSITY
OF ALBERTA**

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ITEM NO. 8**Decision X Discussion** ☐ **Information** ☐**ITEM OBJECTIVE:** To review and approve a refreshed Integrated Asset Management Strategy.

DATE	November 20 th , 2023
TO	General Faculties Council
RESPONSIBLE PORTFOLIO	Andrew Sharman, Vice-President (Facilities and Operations)

MOTION: THAT the General Faculties Council recommend the refreshed Integrated Asset Management Strategy, as set out in Attachment 1, to the Board of Governors for approval.

Background

Approved by the General Faculties Council and the Board of Governors in June 2019, the university's Integrated Asset Management Strategy (IAMS) ensures that decisions related to the stewardship of its infrastructure across the five campuses are made holistically and with the university's long-term objectives in mind. IAMS outlines related principles, goals, and actions.

Although not contemplated when IAMS was developed, work is now underway to develop an accompanying Asset Management Master Plan (AMMP), which will become the university's single master plan for asset utilization (including undeveloped lands), space optimization, and investment prioritization. The AMMP will draw a clear connection between the university's broad-based strategic objectives and paint a picture of what the university's infrastructure could look like over the next 20 years (if investment is available).

Much has changed in the university landscape since June 2019, not the least of which is the release of Shape: The University Strategic Plan 2023-2033 and the ambitious plan to grow to 60,000 students within the decade. While the principles, goals, and actions of IAMS remain largely relevant, much of the contextual content of IAMS has become dated, necessitating a refresh.

Analysis/Discussion

In general, updates to IAMS better reflect the objectives articulated in Shape. Additionally, content has been lifted from IAMS to be incorporated into the AMMP.

- Front sections were edited substantially, primarily to remove content more appropriately reflected in AMMP and strengthen strategic focus.
- Minor edits were made to the principles, goals, and actions to reflect Shape, include content on space optimization, and remove content more applicable to the AMMP.
- Minor language and grammar edits were made to the entire document.

Specific revisions can be reviewed in the redline document that compares the 2019 IAMS with the refreshed IAMS.

Risk Discussion/Mitigation

The following risks are mitigated by refreshing IAMS:

- Leadership - Infrastructure decisions must align with the university's long-term strategic objectives. With the release of Shape, it is necessary to clearly articulate these linkages and connections in the refreshed IAMS.
- Funding/resource management - The AMMP will ensure infrastructure investments transparently consider the greatest return to the institution and improve overall sustainability of the university's infrastructure. The refreshed IAMS provides overarching, strategic guidance to asset management, and ultimately, to related decision-making.

Relevant Legislation/Policy

- Academic Planning Committee Terms of Reference
- Facilities Development Committee Terms of Reference

Next Steps

The refreshed IAMS document is being presented to the university's governance committees in November 2023 and will require Board of Governors approval.

- Academic Planning Committee and Facilities Development Committee - November 15
- General Faculties Council - November 20
- Board Finance and Properties Committee - November 28
- Board of Governors - December 8

Supporting Materials

1. Integrated Asset Management Strategy - Refreshed October 2023
2. Integrated Asset Management Strategy - 2019 vs 2023 Redline

Taking Care of our Campuses

Integrated Asset Management Strategy

Refresh October 2023

The University of Alberta, its buildings, labs and research stations are primarily located on the territory of the Nêhiyaw (Cree), Niitsitapi (Blackfoot), Métis, Nakoda (Stoney), Dene, Haudenosaunee (Iroquois) and Anishinaabe (Ojibway/Saulteaux), lands that are now known as part of Treaties 6, 7 and 8 and homeland of the Métis. The University of Alberta respects the sovereignty, lands, histories, languages, knowledge systems and cultures of all First Nations, Métis and Inuit nations.

Vice-President Facilities and Operations Message

UNDER DEVELOPMENT

Andrew Sharman

Vice-President Facilities and Operations

Strategic Context

Over the next 10 years, the university is sharply focused on delivering innovative, flexible learning and student experiences; reinforcing and enhancing our research, innovation and creative activities; and fulfilling our responsibility as a leader and convenor to help shape and positively impact communities in Alberta, in Canada and worldwide.

This includes developing campus environments to give our students rich, memorable and meaningful experiences, ensuring our high-impact researchers benefit from quality research spaces and supports, and delivering transformational opportunities where students can flourish through experiential learning, residence communities, athletics and recreation, creative activity, and volunteer opportunities. It also means creating more opportunities for students to experience education at Campus Saint-Jean and Augustana Campus and continuing to support access to our facilities, events and activities for the public.

The university remains committed to incorporating Indigenous identities, languages, cultures and worldviews and achieving a more diverse, equitable, accessible and inclusive environment for all who work, learn and live within our community. This also includes providing safe and healthy work and study environments that enable high-quality education and research; leading through the prudent stewardship of resources; embracing opportunities to innovate to make

things better; and working together, within and beyond the university and across traditional boundaries.

Within this context, campus infrastructure must be capable of supporting growth and providing 21st century learning environments and accessible spaces. This strategy identifies the direction and actions to be taken to achieve that. An important focus is that all students, faculty, staff, visitors, and members of the community are stewards of the University of Alberta's buildings and grounds and how each uses the institution today directly impacts its future state.

Most importantly, this strategy sets out principles, goals, and actions to guide decisions that support the infrastructure needs of learners, researchers, faculty, staff, and the community at large, while balancing the financial and reputational risks, opportunities, and fiscal environment in which the institution operates.

The university manages almost 1.63 million square metres in 411 buildings across its campuses and research facilities. This is one of the largest volumes of buildings across the greatest land base of Canadian universities and over 60 percent of these buildings are over 40 years old.

The lifespan and ongoing functionality of infrastructure is affected by how it was constructed, how it was maintained, and how it has been treated by its users. Impacts from sudden weather or temperature changes also impact buildings and grounds. Because limited funding needs to be stretched as far as possible, it is important to ensure evidence drives all infrastructure decision-making. For too many years necessary maintenance and renewal activities have been delayed due to insufficient funding and, if this trajectory is not altered, the institution will face an increasing magnitude of disruptions to facilities and, consequently, the ability to support its academic and research objectives.

Tackling deferred maintenance, future-proofing infrastructure, and continuing sound fiscal stewardship in times of fiscal constraint will require new ways of thinking and decision-making. Even though better data and strategic analytics will inform decisions and improved coordination across campuses and with other partners will reduce concern, optimizing campus infrastructure will require some difficult choices to be made.

The priority across all campuses is on the renewal and refurbishment of existing buildings with very limited consideration for facility expansion or new construction. As facilities are considered for disposal or removed from our infrastructure inventory, the associated operating resources will be retained and directed towards maintaining, renewing, and operating the remaining assets.

By prioritizing our building inventory, a natural process for determining the allocation of available investment can be developed. In practice this means that a building that is nearing end-of-life and not capable of being reasonably renewed to meet teaching and research expectations will be identified for decommissioning and, as such, will receive only critical maintenance investments. For those buildings, efforts to increase awareness of these decisions are needed. Repurposing and/or removing any infrastructure from an institution with over a 100-year history

will require discussion to understand concerns and areas of potential resistance. These collaborative discussions and ultimate choices embody sound asset management practices grounded in principles.

The University of Alberta is not unique in facing a challenge of growing costs for managing infrastructure that exceed available resources, while balancing on-going and changing space needs, changing expectations of users, and increased innovation in building design and delivery. This is a challenge of many post-secondary institutions and public organizations world-wide. What will be unique is how the university is strategic in its use of analytics, the disciplined choices it will make to meet the growing needs and expectations for space, and its decisions in managing these costs. Simply stated, decisions related to identifying buildings for renewal, repurposing, closure, disposal, and even demolition will be driven by the evidence of today with projections of tomorrow. They will also look at partnerships and collaborative opportunities in infrastructure design, operations, maintenance, and funding.

While this strategy provides an overarching direction, an accompanying Asset Management Master Plan (AMMP) is the university's single master plan for infrastructure utilization (including undeveloped lands), space optimization, and investment prioritization. The plan presents a long-term view of our campus infrastructure and the path to get there and highlights evidence-based decision-making to optimize the university's infrastructure portfolio. By using a robust framework for assessing where infrastructure investments return the greatest value to the institution, we will be better able to manage risk and legislative/code compliance; effectively engage and communicate decisions to stakeholders; lower building lifecycle costs; and improve financial and environmental sustainability. The AMMP makes a clear connection between the university's broad-based strategic objectives and a picture of what the university's infrastructure could look like over the next 20 years if investment is available.

Infrastructure Planning and Reporting at the U of A

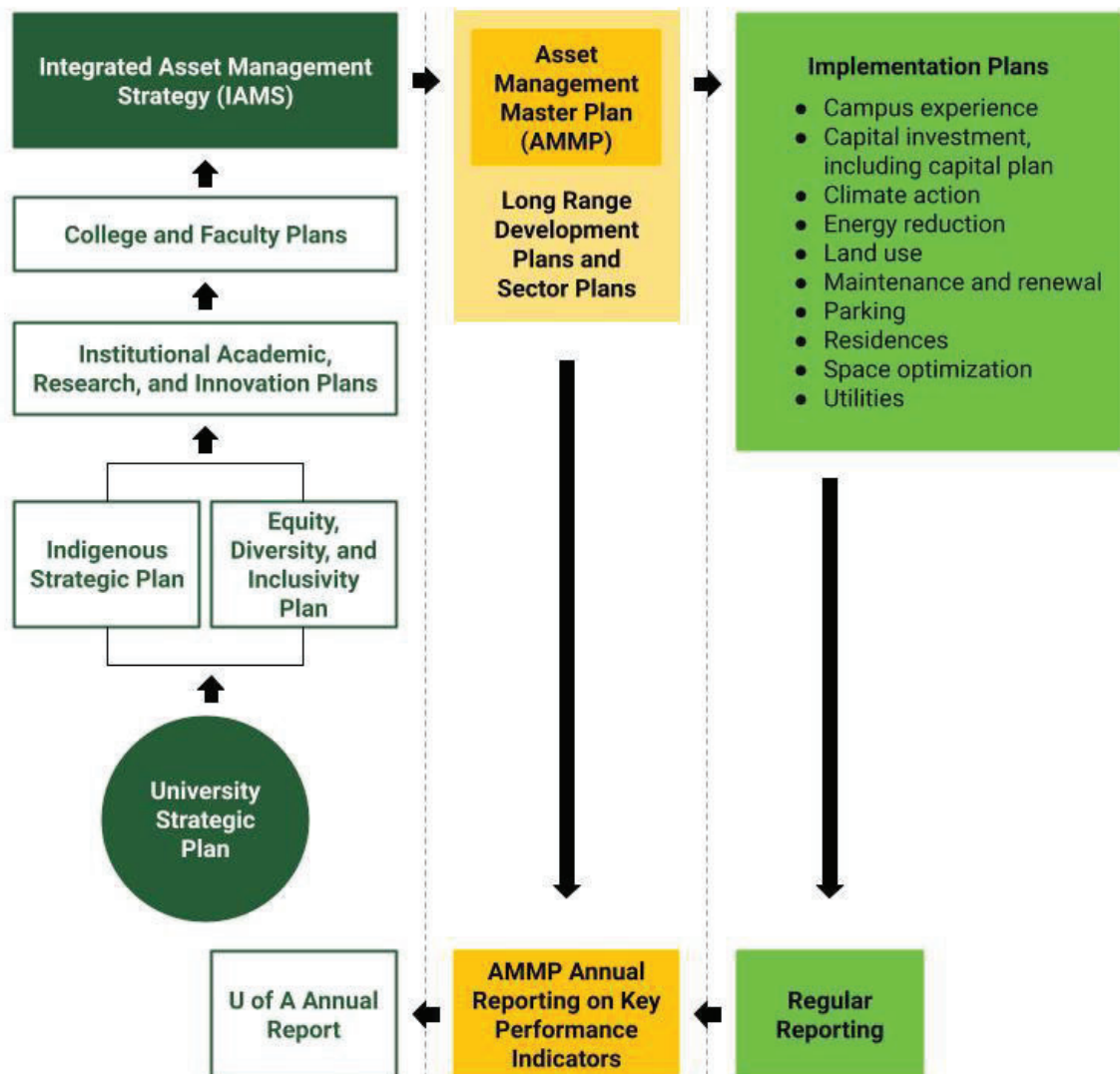
The University of Alberta is renowned for its leadership, achievements, and public service, ranking among the top universities in Canada. The institution also ranks amongst the highest in Canada for its volume and value of infrastructure assets. This large volume of infrastructure assets, while supportive of space needs for all faculty and students, is increasingly difficult to support, and requires the university to strategically consider the life cycle of all buildings and grounds. Accordingly, university infrastructure assets are managed in four life-cycle stages, which are highly interdependent: planning; creating and acquiring; operating and maintaining; and renewing or disposing.

The below visual is a simplified representation of the numerous interdependent plans that the University of Alberta uses to prioritize its decision-making with respect to infrastructure investments. At its core is the University of Alberta's strategic plan, *Shape as seen through the lenses of our commitments to diversity, equity, inclusion, and reconciliation outlined in *Braiding, Past, Present and Future, University of Alberta's Indigenous Strategic Plan* and in the *Strategic**

Plan for Equity, Diversity, and Inclusivity. There is also direction established in *Forward with Purpose: A Strategic Plan for Research and Innovation* which strategically guides the creation, operation, and financial sustainability of core and shared research infrastructure.

Subsequent infrastructure planning is guided by this Integrated Asset Management Strategy (IAMS) that reflects academic and research priorities as defined by the university's colleges and stand-alone faculties. The AMMP brings IAMS to life and is instrumental in developing implementation plans such as the university's annual capital plan, which, as legislated by the Government of Alberta, outlines requests for capital investment for the next three years.

Robust planning serves many needs, including: ensuring accessible space for learners, faculty, and staff; supporting utility needs of campuses; monitoring and maintaining capital assets; designing, renewing, building, and removing capital assets; ensuring ancillary supports and services are available and financially sustainable; and maintaining legislated long-range development plans. Regular reporting ensures progress and accountability.



Principles, Goals, and Actions

Principles set a foundation for a system of decision-making and actions. The subsequent goals guide all infrastructure decisions with corresponding actions to enable implementation. They have been validated by faculty leadership and students and reviewed and supported by both the General Faculties Council and the Board of Governors. The following principles, goals, and actions have a long-term lens in their application.

Principles

Student Success, Life Experience, Research, and Scholarship

1. Campus spaces foster positive student learning and living experiences.
2. Building assets contribute positively to teaching, research, service, and community impact.
3. Building environments, including staff space, reflect today's pedagogies.
4. Facilities are capable of supporting world-class research across multiple disciplines.

Asset Management

5. Buildings are continually evaluated to optimize space utilization and prioritize investments in life-cycle renewal and in maintenance.
6. Recognize the inherent uniqueness in an institution of higher learning, while maximizing system-wide functionality.
7. Social, economic, and environmental sustainability is advanced and achieved by:
 - Incorporating inclusive design principles into campus infrastructure (e.g. all-gender, barrier-free).
 - Reducing our ecological footprint.
 - Reducing operational costs.

Campus Character

8. Every building has a unique role and its strategic value in the institutional inventory is more than a mathematical computation.
9. Prioritizing the active transportation experience on all campuses.
10. Campus buildings and grounds are aesthetically coherent and maintained in a way that considers the community in which it resides.
11. Considerations for removing building inventory include a meaningful assessment of its historic value and placement in the university's architectural mosaic.

Decision-Making

12. Adhere to all government-mandated long range development plans, sector plans, urban planning principles, and building codes and regulations.
 13. Spending adheres to funding parameters and institutional priorities.
 14. Decisions are evidence-based and supported by openly available data related to building occupancy, functionality, performance, environmental considerations, and deferred maintenance.
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Goals and Actions

Planning and Programming

1. Campus planning processes and outputs consider future events, innovation and risks.

Campus planning processes are the convergence of many collaborative planning events to understand, anticipate, and design the campus and identify priorities of tomorrow including alignment with the academic mission; research priorities and needs; supporting students' academic, social and wellness aspects; community engagement; broader community impact; and considering the emergent future risks to a post-secondary institution.

- a. Maintain current Long Range Development Plans and Sector Plans to ensure they act as frameworks to support academic visions and student experiences.
- b. Demonstrate consistency in direction and decisions for campus planning that exemplifies best practices in smart growth, healthy community, and sustainable and inclusive design.
- c. Create more innovative approaches to the development of flexible and adaptable space to meet changing needs of users.

2. The University's infrastructure meets end-users' space needs while enabling a positive experience.

Sound planning and implementation inspires excellence, contributes to a positive educational experience, overall productivity, researcher retention, and satisfaction of end users. Aligning programming, planning, and functional design principles within an academic and research delivery framework is crucial to the success of the user experience. Planning inputs and cycles

consider functional elements spanning the institution, including: academic and research plans, facility imperatives such as maintenance, and risk building profiles.

- a. Advance a consistent approach in optimizing space that aligns with space standards, and provides guidance on how space connects to the overall academic mission, contributes to the student experience, accessibility of key user groups, and unit cost impacts.
- b. Collaborate with colleges and faculties to ensure infrastructure decisions are best able to reflect academic planning outcomes in priority areas.

3. Stakeholders are appropriately informed and engaged when there are significant changes to buildings and spaces.

Based on the resource allocations in the planning and programming phase, ensure that stakeholder engagement, principle-based outcomes and alignment to effective stewardship principles are effectively considered and executed. This will occur in a transparent and responsible manner. Excellence in planning and execution are the cornerstones to both asset management and space utilization.

- a. Develop a consistent approach to communications and engagement prior to any significant change to infrastructure.
- b. Seek input from key stakeholders throughout key design implementation phases to ensure the multitude of institutional perspectives are acknowledged and decisions are founded in a common understanding of approved requirements, limitations, and/or compromises.
- c. Ensure compliance to institutional design and space standards as defined in university policy.

Creating and Acquiring

4. Space aspirations are aligned within a framework of established criteria.

At any given time, students, faculty, and staff will express a desire for new, expanded, or repurposed space. These requests will increasingly undergo a multitude of assessments to understand need, evaluate if stated requirements fall within a framework of established criteria, and seek assurance from leaders of the relevance and value of desired space needs.

- a. Provide guidance and direction to academic and business entities regarding space needs and seek endorsement of appropriate levels of leadership.

- b. Include an evaluation framework, capital and operating budget analysis, operational impact assessment, and consideration of alternatives in planning and design processes.
- c. Prioritize and validate projects requiring government financial support or involving additional funding partners.

Operating and Maintaining

5. Funding is strategically invested in maintenance programs and capital renewal efforts to better manage the university's deferred maintenance liability.

Operating and maintaining infrastructure can account for up to 90 per cent of the total cost of building ownership. As investments in university infrastructure provide incremental savings or instances of cost avoidance, those funds will be diverted to supporting other buildings. Members of the University of Alberta community individually and collectively contribute to how infrastructure is used and cared for.

- a. Enhance predictive and preventative maintenance programming to support improved efficiencies.
- b. Establish campus service standards and levels and actively manage and measure across all campuses.
- c. Develop marketing and awareness campaigns that emphasize the role each member of the university has in stewarding and maintaining its assets.
- d. Advance sustainable operations' practices to support sustainability and environmental targets.

Renewing or Disposing

6. The renewal, repurposing, and end-stage of assets or their components will inform decisions as part of an integrated process.

Optimizing capital and other infrastructure investments to improve their use with centralized asset management and tracking is fundamental. This integrated process reduces excess inventory with a clear understanding of actual needs; enables better decisions in renewal, repurposing, or replacement to avoid unnecessary expenditures; and facilitates the decommissioning and/or disposal of assets.

- a. Undergo a regular review of aligning all assets to the academic and research mission, considering prioritization criteria and guiding principles.

- b. Utilize financial, space, and academic modeling as part of the analytic framework to support choices of which buildings will (or will not) undergo change.

Strategic Enablers

7. A strong information and analytics platform supports evidence-based decision-making.

Robust, consistent, and transparent decisions can only be made when the information they are based on is complete, accurate, and integrated. In order to support improved management of infrastructure, potential investment decisions, or monitoring of performance against service levels, a strong data inventory and analytics framework is needed.

- a. Strengthen front line processes and information gathering to instill higher confidence in facilities' data.
- b. Complete technology and business needs assessments to identify integrated solutions that support business requirements.
- c. Build predictive modeling of key assets that consider multiple factors to the longevity and operational costs of assets.

8. Enhanced monitoring and reporting of progress ensures transparency and accountability.

This strategy provides a framework for the effective and efficient management of the institutions' assets. This is a living document which is relevant and integral to the daily asset management activities across the campuses.

- a. Refresh the strategy as necessary to reflect changing university imperatives.
- b. Conduct quality assurance audits to ensure the integrity and cost effectiveness of data collected.
- c. Use reporting mechanisms to report on progress and performance.

Infrastructure for Tomorrow

In many tangible ways, a university campus replicates a small city. In the case of the University of Alberta's North Campus, 160 buildings of varying use, age, and complexity are connected by a network of streets, sidewalks, and tunnels. While comprising fewer buildings, Campus Saint-Jean, Augustana, Enterprise Square, and South Campus also each form key elements of the university's rich infrastructure mosaic.

All decisions related to investing in campus infrastructure are naturally very long-term in nature and, in a world with limited resources, must be made prudently and with an eye clearly focused on the future. The future of world-class teaching and research. The future of memorable student experiences. A sustainable future.

Shape, A Strategic Plan of Impact, reminds us of the imperative for us to be at the forefront of educating a growing province with global ambitions. Key to this is having and maintaining university infrastructure - classrooms, labs, libraries, study spaces, and other spaces to enhance the student experience - that meet today's expectations without constraining tomorrow's ambitions. With the necessary support of willing partners, the University of Alberta's Integrated Asset Management Strategy will get us there.

University of Alberta - Integrated Asset Management Strategy (IAMS) **REDLINE**

IAMS 2019	IAMS 2023	Comments
Taking Care of our Campuses Integrated Asset Management Strategy	Taking Care of our Campuses Integrated Asset Management Strategy	No change
Territorial Acknowledgement The University of Alberta respectfully acknowledges that we are situated on Treaty 6 territory, traditional lands of First Nations and Métis people.	<u>Territorial Acknowledgement</u> <u>The University of Alberta, its buildings, labs and research stations are primarily located on the territory of the Nêhiyaw (Cree), Niitsitapi (Blackfoot), Métis, Nakoda (Stoney), Dene, Haudenosaunee (Iroquois) and Anishinaabe (Ojibway/Saulteaux), lands that are now known as part of Treaties 6, 7 and 8 and homeland of the Métis. The University of Alberta respects the sovereignty, lands, histories, languages, knowledge systems and cultures of all First Nations, Métis and Inuit nations.</u>	Revised to match Shape.
Vice-President Facilities and Operations Message The University of Alberta's Strategic Plan (2016-26), For the Public Good, defines the vision, goals, and specific targets that guide the institution's focus and resources. For the Public Good sets the conditions to inspire the human spirit through outstanding achievements in learning, discovery, and citizenship in a creative community. A key objective is the importance of ensuring our campuses, facilities, and utilities meet the institution's needs and goals. Facilities and Operations leads this work and is proud of what's been accomplished to-date and of how its future planning will support decisions that align to learners' and researchers' needs. The University of Alberta is renowned for its leadership, achievements, and public service, ranking among the top universities in Canada. The institution also ranks amongst the highest in Canada for its volume and value of infrastructure assets. This large volume of assets, while supportive of space needs for all faculty and students, requires the university to strategically look at the life cycle of all buildings and grounds. This means: planning, creating and acquiring, operating and maintaining, and renewing or disposing. This on-going life cycle review of buildings and grounds facilitates continued excellence in supporting learning and research. The ways in which spaces are designed, used, and maintained are critical factors to the accessibility, effectiveness, and sustainability of assets. Facilities and Operations will continue to proactively and cost-effectively manage its assets, strengthening the learning and research foundations for students,	<u>Vice-President Facilities and Operations Message</u> <u>UNDER DEVELOPMENT</u> <u>Andrew Sharman</u> <u>Vice-President Facilities and Operations</u>	Moved some text to other sections. Message will be redrafted by Communications to: Add reference to Shape. Remove content more applicable to the Asset Management Master Plan (AMMP).

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University of Alberta - Integrated Asset Management Strategy (IAMS) **REDLINE**

IAMS 2019	IAMS 2023	Comments
faculty, staff, and community. The condition of buildings and physical support assets are assessed on a regular basis to ensure they will deliver the optimal value over every building's lifespan and ensure the life, health, and safety of users. While some deferred maintenance may not present an immediate challenge, as the maintenance backlog grows, the risk of building failures (mechanical, electrical, building envelope) grows exponentially. This means the cost of maintenance continues to grow (including inflationary pressures and market escalation as the age of a facility increases and needed maintenance is not completed. With the aging facilities and the growing uncertainty of provincial operating and maintenance funding, the university's deferred maintenance liability will continue to grow until a "tipping point" is reached. This may necessitate directing available funding to emergency or break down situations, versus maintaining the facilities. This Integrated Asset Management Strategy will look at better utilizing owned space, reducing reliance on leased space, appropriately renewing or disposing of buildings, and prioritizing where the university needs to invest its limited resources to address deferred maintenance liabilities. This all must occur while increasing a focus on preventive maintenance. Publicly funded infrastructure will be increasingly scrutinized to ensure renewal, repurposing, and optimization occurs in advance of any new construction. This continues to put pressure on all public organizations to better use and maintain their assets. This strategy is, simply put, a guide to ensure all aspects of managing the physical assets of the university are considered. This means optimizing the inventory of facilities that are key to the institution's mandate and prioritizing that inventory based on critical, to necessary, to non-necessary. As the University of Alberta continues to change and evolve to continue meeting users' needs, its infrastructure must be positioned to support these changing needs and demands, now and into the future. The Facilities and Operations team looks forward to meeting these needs and collaborating across the University of Alberta and with others to take care of our campuses. Andrew Sharman Vice-President Facilities and Operations		

University of Alberta - Integrated Asset Management Strategy (IAMS) **REDLINE**

IAMS 2019	IAMS 2023	Comments
Why a Strategy The impact of the growing operational and maintenance challenges has created a perfect storm—increased demand and expectations coupled with aging inventory, limited funding, and uncertainty of funding in the future. Facilities and Operations has therefore engaged in a review of how the university manages its inventory, what funding can reasonably be expected versus what is needed, and how best to move forward while maintaining the desire to be a leading academic institution. This strategy sets the direction for the University of Alberta's infrastructure assets, while defining a long-term roadmap. It describes the current state and the conditions that created some of the challenges currently being faced, while also identifying the future direction and actions to be taken. An important focus of this strategy is that all students, staff, faculty, visitors, and members of the community are stewards of the University of Alberta's buildings and grounds and how each uses the institution today has a direct impact on its future state. This strategy also sets a collective mission, vision, principles, goals, and actions for future-proofing the University of Alberta's infrastructure. It will help guide decisions to support the infrastructure needs of learners, faculty, staff, and community, while balancing the risks, opportunities, and fiscal environment in which the institution operates. This strategy is a living document that will be reviewed as part of annual planning processes. The development of the strategy occurred amongst Facilities and Operations staff with communication and feedback incorporated from stakeholders across the campuses. This strategy was approved by the University of Alberta's Board of Governors and General Faculties Council in spring 2019 to ensure that collective feedback was considered and there was awareness of the actions that will lay ahead.	n/a	Removed content more applicable to AMMP. Amalgamated into a new Strategic Context section.
Strategic Context The university manages almost 1.73 million square metres in nearly 500 buildings across its five campuses. This is one of the largest volumes of buildings across the greatest land base of Canadian universities and over 60 percent of these buildings are over 40 years old. The widely recognized maintenance investment for post-secondary institutions is typically two per cent of the buildings' replacement value and, when investments fall short of that target, maintenance is	<u>Strategic Context</u> <u>Over the next 10 years, the university is sharply focused on delivering innovative, flexible learning and student experiences; reinforcing and enhancing our research, innovation and creative activities; and fulfilling our responsibility as a leader and convenor to help shape and positively impact communities in Alberta, in Canada and worldwide.</u>	Combined with Why a Strategy and Environmental Analysis section. Removed content more applicable to the AMMP.

University of Alberta - Integrated Asset Management Strategy (IAMS) **REDLINE**

IAMS 2019	IAMS 2023	Comments
deferred. Deferred maintenance is essentially the difference between the optimal investment and the actual investment in maintenance and, in its simplest definition, is the maintenance that should have been done, but wasn't. There are a number of factors that contribute to the growth in deferred maintenance liability. One of the greatest factors was insufficient funding for preventive and deferred maintenance from government and the institution over the past many years. A second factor is the accelerated depreciation of some buildings and roadways, which is largely due to unsustainable construction practices in the 1950s that did not consider long-term maintenance needs, nor the impact of extreme changes in weather patterns. The DNA of all buildings going forward needs to be future-proofed against extreme and expensive maintenance and long-term renewal costs. Lastly, there has been an absence of data and analytics that identified current and forecasted future state of buildings to enable pro-active planning and strategic allocation of maintenance funding. The lifespan and ongoing functionality of infrastructure is affected by how it's used, looked after, the ways in which services and repairs are carried out, the prioritization for renewal, the current and future needs and expectations of users, and available funding. Impacts from sudden weather or temperature changes also impact buildings and grounds. All of these impacts make it important to ensure evidence drives decisions of how best to support continued infrastructure renewal and plan for long-term needs. For many years necessary maintenance work has been delayed indefinitely due to insufficient funding and, if this trajectory is not altered, the institution will face an increasing magnitude of disruptions to facilities and, consequently, the ability to support the academic and research objectives. Tackling maintenance backlogs, future-proofing infrastructure, and continuing good fiscal stewardship in times of economic constraint will require new ways of thinking and making decisions. This will mean difficult choices, optimizing existing infrastructure, improved coordination across campuses and with other partners, and better data and strategic analytics. The collective challenge is to balance expectations with the best use of limited resources while considering growth of assets versus ongoing maintenance. While there have been remarkable additions to the University's building inventory in the last decade, the priority across all campuses is now on the renewal and refurbishment of existing buildings with very limited consideration for facility expansion or new construction. A critical assumption is that, as facilities are	<u>This includes developing campus environments to give our students rich, memorable and meaningful experiences, ensuring our high-impact researchers benefit from quality research spaces and supports, and delivering transformational opportunities where students can flourish through experiential learning, residence communities, athletics and recreation, creative activity, and volunteer opportunities. It also means creating more opportunities for students to experience education at Campus Saint-Jean and Augustana Campus and continuing to support access to our facilities, events and activities for the public.</u> <u>The university remains committed to incorporating Indigenous identities, languages, cultures and worldviews and achieving a more diverse, equitable, accessible and inclusive environment for all who work, learn and live within our community. This also includes providing safe and healthy work and study environments that enable high-quality education and research; leading through the prudent stewardship of resources; embracing opportunities to innovate to make things better; and working together, within and beyond the university and across traditional boundaries.</u> <u>Within this context, campus infrastructure must be capable of supporting growth and providing 21st century learning environments and accessible spaces. This strategy identifies the direction and actions to be taken to achieve that. An important focus is that all students, faculty, staff, visitors, and members of the community are stewards of the University of Alberta's buildings and grounds and how each uses the institution today directly impacts its future state.</u> <u>Most importantly, this strategy sets out principles, goals, and actions to guide decisions that support the infrastructure needs of learners, researchers, faculty, staff, and the community at large, while balancing the financial and reputational risks, opportunities, and fiscal environment in which the institution operates.</u> <u>The university manages almost 1.63 million square metres in 411 buildings across its campuses and research facilities. This is one of the largest volumes of buildings across the greatest land base of Canadian universities and over 60 percent of these buildings are over 40 years old.</u> <u>The lifespan and ongoing functionality of infrastructure is affected by how it</u>	Added content from Shape. Added reference to an AMMP. Added some text from Vice-President's message and Environmental Analysis sections. Language and wording updates.

University of Alberta - Integrated Asset Management Strategy (IAMS) **REDLINE**

IAMS 2019	IAMS 2023	Comments
considered for disposal or removed from the infrastructure inventory, the associated funding is retained and directed towards maintaining, upgrading, and operating the remaining key assets. By prioritizing the inventory, a natural process for determining the allocation of available funding can be developed. This means that some facilities will receive more funding (to get them up to the desired standard); some may receive the same (given their condition and usage); some may receive less (due to lower priority/end of life cycle); and some may not receive funding at all. For those facilities identified as needing less or no funding, additional work is necessary to increase awareness of these decisions to relevant stakeholders/users. In some instances, this leads to consideration for the disposition of those facilities and the impact on programs. Where the university's facility assets cannot meet the criteria necessary to justify retention and/or upgrading, then alternatives need to be considered.	<u>was constructed, how it was maintained, and how it has been treated by its users. Impacts from sudden weather or temperature changes also impact buildings and grounds. Because limited funding needs to be stretched as far as possible, it is important to ensure evidence drives all infrastructure decision-making. For too many years necessary maintenance and renewal activities have been delayed due to insufficient funding and, if this trajectory is not altered, the institution will face an increasing magnitude of disruptions to facilities and, consequently, the ability to support its academic and research objectives.</u> <u>Tackling deferred maintenance, future-proofing infrastructure, and continuing sound fiscal stewardship in times of fiscal constraint will require new ways of thinking and decision-making. Even though better data and strategic analytics will inform decisions and improved coordination across campuses and with other partners will reduce concern, optimizing campus infrastructure will require some difficult choices to be made.</u> <u>The priority across all campuses is on the renewal and refurbishment of existing buildings with very limited consideration for facility expansion or new construction. As facilities are considered for disposal or removed from our infrastructure inventory, the associated operating resources will be retained and directed towards maintaining, renewing, and operating the remaining assets.</u> <u>By prioritizing our building inventory, a natural process for determining the allocation of available investment can be developed. In practice this means that a building that is nearing end-of-life and not capable of being reasonably renewed to meet teaching and research expectations will be identified for decommissioning and, as such, will receive only critical maintenance investments. For those buildings, efforts to increase awareness of these decisions are needed. Repurposing and/or removing any infrastructure from an institution with over a 100-year history will require discussion to understand concerns and areas of potential resistance. These collaborative discussions and ultimate choices embody sound asset management practices grounded in principles.</u> <u>The University of Alberta is not unique in facing a challenge of growing costs for managing infrastructure that exceed available resources, while balancing on-going and changing space needs, changing expectations of users, and</u>	

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	<u>increased innovation in building design and delivery. This is a challenge of many post-secondary institutions and public organizations world-wide. What will be unique is how the university is strategic in its use of analytics, the disciplined choices it will make to meet the growing needs and expectations for space, and its decisions in managing these costs. Simply stated, decisions related to identifying buildings for renewal, repurposing, closure, disposal, and even demolition will be driven by the evidence of today with projections of tomorrow. They will also look at partnerships and collaborative opportunities in infrastructure design, operations, maintenance, and funding.</u> <u>While this strategy provides an overarching direction, an accompanying Asset Management Master Plan (AMMP) is the university's single master plan for infrastructure utilization (including undeveloped lands), space optimization, and investment prioritization. The plan presents a long-term view of our campus infrastructure and the path to get there and highlights evidence-based decision-making to optimize the university's infrastructure portfolio. By using a robust framework for assessing where infrastructure investments return the greatest value to the institution, we will be better able to manage risk and legislative/code compliance; effectively engage and communicate decisions to stakeholders; lower building lifecycle costs; and improve financial and environmental sustainability. The AMMP makes a clear connection between the university's broad-based strategic objectives and a picture of what the university's infrastructure could look like over the next 20 years if investment is available.</u>	
Vision Provide the foundation that enables the university community to excel.	Vision Provide the foundation that enables the university community to excel.	Redundant to university vision.
Mission That the University of Alberta has superior stewardship of all its infrastructure across the five campuses, while cultivating the best possible environment for learning, teaching and research now and into the future.	Mission That the University of Alberta has superior stewardship of all its infrastructure across the five campuses, while cultivating the best possible environment for learning, teaching and research now and into the future.	Redundant to university mission.
Planning Cycle The below visual (Figure 1) is a simplified representation of the numerous	<u>Infrastructure Planning and Reporting at the U of A</u> <u>The University of Alberta is renowned for its leadership, achievements, and</u>	Removed content more applicable to the AMMP.

University of Alberta - Integrated Asset Management Strategy (IAMS) **REDLINE**

IAMS 2019	IAMS 2023	Comments
interdependent plans that the University of Alberta uses to achieve its vision, mission, and outcomes, while shaping and stewarding its direction. Embedded as the core, is the University of Alberta's overarching Strategic Plan, For the Public Good. The cascade of planning then starts with academic and research plans through to administrative business plans such as the university's Capital Plan, which is a legislated document required by the Government of Alberta, through to the annual Comprehensive Institutional Plan and department plans. The Capital Plan is informed by other Facilities and Operations' related information, such as: consultation across campuses, long range development plans, resource plans, space utilization data, and prioritization processes. This work aligns and works together to serve many needs, including: ensuring accessible space for learners, faculty, and staff; supporting utility needs of campuses; monitoring and maintaining assets; designing, renewing, building, and removing capital assets; ensuring ancillary supports and services are available; and maintaining legislated long-range development plans. This strategy supports and guides the annual Capital Plan. It helps build and strengthen the right foundations to strategically respond to the academic and research missions, while considering the needs of users and the fiscal realities. Figure 1: Planning landscape at the University of Alberta	<u>public service, ranking among the top universities in Canada. The institution also ranks amongst the highest in Canada for its volume and value of infrastructure assets. This large volume of infrastructure assets, while supportive of space needs for all faculty and students, is increasingly difficult to support, and requires the university to strategically consider the life cycle of all buildings and grounds. Accordingly, university infrastructure assets are managed in four life-cycle stages, which are highly interdependent: planning; creating and acquiring; operating and maintaining; and renewing or disposing.</u> <u>The below visual is a simplified representation of the numerous interdependent plans that the University of Alberta uses to prioritize its decision-making with respect to infrastructure investments. At its core is the University of Alberta's strategic plan, Shape as seen through the lenses of our commitments to diversity, equity, inclusion, and reconciliation outlined in Braiding, Past, Present and Future, University of Alberta's Indigenous Strategic Plan and in the Strategic Plan for Equity, Diversity, and Inclusivity. There is also direction established in Forward with Purpose: A Strategic Plan for Research and Innovation which strategically guides the creation, operation, and financial sustainability of core and shared research infrastructure.</u> <u>Subsequent infrastructure planning is guided by this Integrated Asset Management Strategy (IAMS) that reflects academic and research priorities as defined by the university's colleges and stand-alone faculties. The AMMP brings IAMS to life and is instrumental in developing implementation plans such as the university's annual capital plan, which, as legislated by the Government of Alberta, outlines requests for capital investment for the next three years.</u> <u>Robust planning serves many needs, including: ensuring accessible space for learners, faculty, and staff; supporting utility needs of campuses; monitoring and maintaining capital assets; designing, renewing, building, and removing capital assets; ensuring ancillary supports and services are available and financially sustainable; and maintaining legislated long-range development plans. Regular reporting ensures progress and accountability.</u> <u>New Graphic</u>	Added reference to Shape. Added reference to an AMMP. Added some text from Vice-President's message. Added an updated infrastructure planning and reporting graphic. Language and wording updates.
Environmental Analysis	n/a	Combined with Strategic

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The University of Alberta is not unique in facing a challenge of growing costs for infrastructure maintenance that exceed available resources, while balancing on-going and changing space needs, changing expectations of users, and increased innovation in building design and delivery. This is a challenge of many post-secondary institutions and public organizations world-wide. What will be unique is how the University is strategic in its use of analytics, the disciplined choices it will make to meet the growing needs and expectations for space, and its decisions in managing these costs. The on-going choices will include: identifying assets for renewal, repurposing, closure, disposal, and even demolition. The choices will be driven by evidence of today with projections of tomorrow. They will also look at partnerships and collaborative opportunities in infrastructure design, operations, maintenance, and funding. Maintenance is considered any activity that seeks to maintain the desired operating condition of an asset. Keeping up with maintenance ensures reliable and safe building occupancy for users. There are five types of maintenance, including: 1) emergency and reactive maintenance that is typically unplanned and urgent; 2) supportive maintenance that supports program and research equipment; 3) corrective maintenance that seeks to resolve chronic failures through performing major repairs or replacement of assets; 4) preventive and predictive maintenance that seeks to resolve maintenance issues before they arise as well as regular maintenance requirements; and 5) deferred maintenance that is required but deferred to future years. The accrual of deferred maintenance increases the risk and liability to the institution and is a large focus of this strategy. The current asset replacement value of the supported and unsupported buildings is nearly \$7.25 billion¹. As of 2018, the University of Alberta's deferred maintenance liability for these buildings was nearly \$353 million¹, with only \$34.9 million² currently provided as an annual Infrastructure Maintenance Program (IMP) grant for the supported buildings by the Government of Alberta. The University's buildings, roadways and grounds, whether for learning and research, student services, offices or storage, incur significant capital and recurring operating and maintenance costs and are amongst the highest of the direct operating costs of the institution. If this current rate of growth of on-going maintenance and deferred maintenance liability continues, deferred maintenance liability could reach \$1 billion by 2027 (See Figure 2). In order to effectively manage risks associated with this liability, it is critical to		Context section. Removed content more applicable to the AMMP.

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strategically invest funding. Extensive research across North America suggests that the annual average maintenance investment in facilities should represent approximately two per cent of the replacement value. This can vary from less than two per cent to around five per cent for complex and/or sophisticated buildings (laboratories, research, and other specialized facilities). This would typically have meant a minimum of \$145 million per year (two per cent of \$7.25 billion of the current replacement value) dedicated to maintenance to avoid an accumulation of deferred maintenance for all buildings and roadways. The impact of not having an appropriate threshold of maintenance funding for infrastructure has resulted in the current deferred maintenance liability and its rapid upward trend. Facility maintenance is a continuum made up operational (day to day), major maintenance (building systems and components), and major upgrade/modernization. The University is funded by the Government of Alberta through a variety of sources: operational through lights-on funding (allocated as part of our base funding allocation), major maintenance through capital maintenance and renewal (IMP) funding, and major upgrade/modernization funding which is provided on a project-by-project approval basis. Other sources of maintenance funding can be directed from internal sources such as partner funding from faculties or centrally by the university. The University contributed its first funding of \$1 million in 2019-20 to address deferred maintenance with an aspiration for that amount to increase over time. Difficult choices lie ahead and repurposing and/or removing any infrastructure from such a monumental institution with over a 100-year history will require debate and discussion to understand concerns and areas of potential resistance. These collaborative discussions and ultimate choices are good asset management practices grounded in principles. The principles have been discussed in early 2019 with the Board of Governors, the General Faculties Council, the university's executive and faculty leadership, and students. The principles emphasize: 1) student life experience, research and scholarship; 2) asset management; 3) campus character; and 4) decision-making. Figure 2 provides examples of the types of choices that will be informed by an asset management strategy. This figure forecasts six scenarios based on varying levels of financial commitment from the Government of Alberta and the University of Alberta to mitigate the deferred maintenance liability coupled with removing building assets that have either exceeded their life expectancy, their cost to		

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maintain is larger than the value of the buildings, and/or they no longer meet users' needs in design or operation. While these are only examples, they illustrate the disciplined choices necessary over the years ahead requiring deep engagement across the institution and tight alignment to the institution's academic and research needs. Figure 2: Deferred maintenance liability scenarios for supported, unsupported and mixed buildings The data presented in Figure 2 are the best available at this time, but do not include the maintenance needs of the newer and more complex buildings on campus³. It is likely that when this information becomes available and integrated into our information systems, the forecasted liabilities will be significantly higher. Greater than 50% of the University of Alberta's individual buildings were built in the post-war (1951-75) or modern (1976-90) eras. These eras were known to have unsustainable construction processes with an original intent that lesser construction quality would be offset by sufficient maintenance funding that would mitigate deficiencies. These buildings have a 50–60 year life cycle, ending now (Figure 3). Many of the critical systems in these buildings are at or near the end of their life and their failures would impair the delivery of the institution's academic mission if preservation funding or increased maintenance dollars are not available. The choices the University makes will need to bend the trend of expenditure growth in our deferred maintenance liability. While the adjacent visuals display the number and volume of buildings at different ages and areas, the impact of the more modern and complex buildings will be significant (Figure 4). This second wave of impact of maintenance needs requires the planning and financial policies to be established now in order to best mitigate the future consequences. Figure 3: Building Distribution Based on Age Figure 4: Bow Wave of Deferred Maintenance Liability		
Principles Principles set a foundation for a system of decision-making and actions. The below principles are guiding the asset management decisions that will be made in the short and long term. They have been reviewed and supported by both the General Faculties Council and Board of Governors, as well as leadership tables	Principles, <u>Goals, and Actions</u> Principles set a foundation for a system of decision-making and actions. The <u>subsequent goals guide all infrastructure decisions with corresponding actions to enable implementation. below principles are guiding the asset management decisions that will be made in the short and long term.</u> They have been	Combined with Goals and Actions section. Removed content more appropriately included in the AMMP.

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such as President's Executive Committee. The fourteen principles are intended to have a long term lens in their application.	<u>validated by faculty leadership and students and</u> reviewed and supported by both the General Faculties Council and <u>the</u> Board of Governors, as well as leadership tables such as President's Executive Committee. The <u>following fourteen</u> principles, <u>goals, and actions are intended to</u> have a long term lens in their application.	
Student Success, Life Experience, Research and Scholarship 1.Campus spaces foster positive student learning and living experiences. 2.Building assets that positively contribute to teaching, research and service. 3.We endeavour to provide modern environments, including staff space, reflective of today's pedagogies. 4.Facilities are capable of supporting world-class research across multiple disciplines.	Student Success, Life Experience, Research and Scholarship 1.Campus spaces foster positive student learning and living experiences. 2.Building assets that positively contribute to teaching, research, <u>service,</u> and <u>community impact</u>service. 3.We endeavour to provide modern <u>Building</u> environments, including staff space, reflective of today's pedagogies. 4.Facilities are capable of supporting world-class research across multiple disciplines.	Language/grammar edits. Added link to content in Shape.
Asset Management 5.Buildings are continually evaluated to prioritize investments in capital (renewal, expansion, new construction); in maintenance (preventative, current and deferred); and obsolescence. 6.Recognizing the inherent uniqueness in an institution of higher learning, while maximizing system-wide functionality. 7.Social, economic and environmental sustainability is achieved by: • Incorporating inclusive design principles into campus infrastructure (e.g. all-gender, barrier-free). • Reducing our ecological footprint. • Reducing operational costs. • Continually advancing the three pillars of sustainability: social, economic and environmental.	Asset Management 5.Buildings are continually evaluated to <u>optimize space utilization and</u> prioritize investments in <u>life-cycle renewal and in maintenance.</u> capital (renewal, expansion, new construction); in maintenance (preventative, current and deferred); and obsolescence. 6.Recognize<u>ing</u> the inherent uniqueness in an institution of higher learning, while maximizing system-wide functionality. 7.Social, economic and environmental sustainability is <u>advanced and</u> achieved by: • Incorporating inclusive design principles into campus infrastructure (e.g. all-gender, barrier-free). • Reducing our ecological footprint. • Reducing operational costs. • Continually advancing the three pillars of sustainability: social, economic and environmental.	Added reference to space optimization. Language/grammar edits.
Campus Character	Campus Character	Language/grammar edits.

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8. Every building has a unique role and its strategic value in the institutional inventory is more than a mathematical computation. 9. Fostering the active transportation experience is seen to be a priority on all campuses. 10. Campus buildings and grounds will be aesthetically coherent and maintained in a way that considers the community in which it resides. 11. Considerations for removing building inventory will include a meaningful assessment of its historic value and placement in the university's architectural mosaic.	8. Every building has a unique role and its strategic value in the institutional inventory is more than a mathematical computation. 9. Prioritizing Fostering the active transportation experience is seen to be a priority on all campuses. 10. Campus buildings and grounds are will be aesthetically coherent and maintained in a way that considers the community in which it resides. 11. Considerations for removing building inventory will include a meaningful assessment of its historic value and placement in the university's architectural mosaic.	
Decision-Making 12. Adhere to all government-mandated long range development plans, sector plans, urban planning principles, and building codes and regulations. 13. Spending must adhere to government guided parameters: • "Lights-on" (Base) funding: the portion of the Campus Alberta Grant that is used to cover building operating costs (e.g. utilities, janitorial, maintenance, insurance, etc.). • Infrastructure Maintenance Program (IMP): a variable annual allocation intended to address deferred maintenance on base building systems. • Capital grants: funds received in order to achieve a specific building project. 14. Decisions are evidence-based and supported by openly available data related to building occupancy, functionality, performance, environmental considerations, and deferred maintenance. • Supported by the CIP, we strive to have a "data-driven approach to maintaining, renovating and repurposing existing spaces on campus." • In order to support modern learning environments we need to have the ability to sustain building infrastructure.	Decision-Making 12. Adhere to all government-mandated long range development plans, sector plans, urban planning principles, and building codes and regulations. 13. Spending must <u>adheres to funding parameters and institutional priorities.</u> government guided parameters: • "Lights-on" (Base) funding: the portion of the Campus Alberta Grant that is used to cover building operating costs (e.g. utilities, janitorial, maintenance, insurance, etc.). • Infrastructure Maintenance Program (IMP): a variable annual allocation intended to address deferred maintenance on base building systems. • Capital grants: funds received in order to achieve a specific building project. 14. Decisions are evidence-based and supported by openly available data related to building occupancy, functionality, performance, environmental considerations, and deferred maintenance. • Supported by the CIP, we strive to have a "data-driven approach to maintaining, renovating and repurposing existing spaces on campus." • In order to support modern learning environments we need to have the ability to sustain building infrastructure.	Language/grammar edits. Removed content more appropriately included in the AMMP.
Goals and Actions	Goals and Actions	Combined with Principles

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There are four stages, illustrated below, of the life cycle of assets (Figure 5). They are highly interdependent, suggesting the rigour and quality of each stage impacts the subsequent stages. These align with the aforementioned principles and each has specific goals and actions that will be monitored and reported as part of regular operations within Facilities and Operations. This regular reporting will include performance indicators, best practice targets, and on-going review and risk analyses. Figure 5: Asset Management Life Cycle	There are four stages, illustrated below, of the life cycle of assets (Figure 5). They are highly interdependent, suggesting the rigour and quality of each stage impacts the subsequent stages. These align with the aforementioned principles and each has specific goals and actions that will be monitored and reported as part of regular operations within Facilities and Operations. This regular reporting will include performance indicators, best practice targets, and on-going review and risk analyses. Figure 5: Asset Management Life Cycle	section. Removed content more applicable to the AMMP. Figure 5 moved to new Infrastructure Planning and Reporting at the U of A section.
Planning and Programming 1.Strengthen campus planning processes and outputs to consider future events, innovation and risks. Campus long range development planning processes are the convergence of many collaborative planning events to understand, anticipate, and design the campus and identify priorities of tomorrow including alignment with the academic mission; research priorities and needs; supporting students' academic, social and wellness aspects; and considering the emergent future risks to a post-secondary institution. A. Maintain current Long Range Development Plans and Sector Plans⁴ to ensure they act as frameworks to support academic visions and student experiences. B. Demonstrate consistency in direction and decisions for campus planning that exemplifies best practices in smart growth, healthy community and sustainable design. C. Create more innovative approaches to the development of flexible and adaptable space to meet changing needs of users. 2.The University's infrastructure will meet end-users' space needs while enabling a positive experience. Planning inputs and cycles are interdependent with many functional inputs across the institution, including: academic, research, operational, risk, equipment maintenance, deferred maintenance, and capital disposal. Sound planning and implementation inspires excellence, significantly impacts educational progress,	Planning and Programming 1.Strengthen cCampus planning processes and outputs to consider future events, innovation and risks. Campus long range development planning processes are the convergence of many collaborative planning events to understand, anticipate, and design the campus and identify priorities of tomorrow including alignment with the academic mission; research priorities and needs; supporting students' academic, social and wellness aspects; <u>community engagement; broader community impact</u>; and considering the emergent future risks to a post-secondary institution. A. Maintain current Long Range Development Plans and Sector Plans⁴ to ensure they act as frameworks to support academic visions and student experiences. B. Demonstrate consistency in direction and decisions for campus planning that exemplifies best practices in smart growth, healthy community, and sustainable <u>and inclusive</u> design. C. Create more innovative approaches to the development of flexible and adaptable space to meet changing needs of users. 2.The University's infrastructure <u>will meet</u>s end-users' space needs while enabling a positive experience. <u>Sound planning and implementation inspires excellence, contributes to a positive educational experience, overall productivity, researcher retention, and satisfaction of end users. Aligning programming, planning, and functional</u>	Language/grammar edits.

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overall productivity, researcher retention, and satisfaction of end users. Aligning programming, planning, and functional design principles within an academic and research delivery framework is crucial to the success of the user experience. It is a pathway that is deliberate and guided by many tangible and intangible factors and phases. The formalization from idea to a hard asset is founded in life cycle and deeply connected to a strong stewardship mandate. Over the course of a normal life cycle span, approximately only one tenth of an asset's cost is related to its initial capitalization phase and, as such, the relevance of life cycle assessments is fundamentally important in determining and making decisions to construct, lease, or acquire new assets. A. Advance a consistent approach in optimizing space that aligns with space standards, and provides guidance on how space connects to the overall academic mission, accessibility of key user groups, and unit cost impacts. B. Collaborate with faculties to ensure completion of General Space Programming (GSP) and Functional Programing (FP) to affect academic planning outcomes in priority areas. 3.Stakeholders are appropriately informed and engaged when there are significant changes to assets. Based on the resource allocations in the planning and programming phase, ensure that stakeholder engagement, principle-based outcomes and alignment to effective stewardship principles are effectively considered and executed. This will occur in a transparent and responsible manner. Excellence in planning and execution are the cornerstones to both asset management and space utilization. A. Develop a consistent approach to communications and engagement prior to any significant change to infrastructure. B. Throughout key design implementation phases, input is sought from stakeholders to ensure the multitude of institutional perspectives are acknowledged and decisions are founded in a common understanding of approved requirements, limitations, and/or compromises. C. Ensure compliance to institutional design and operational standards as part of the Board of Governors space policy.	design principles within an academic and research delivery framework is crucial to the success of the user experience. Planning inputs and cycles consider <u>are interdependent with many functional elements spanning inputs across</u> the institution, including: <u>academic and research plans, ,research, facility imperatives such as maintenance, and building risk profiles.operational, risk, equipment maintenance, deferred maintenance, and capital disposal.</u> <u>Sound planning and implementation inspires excellence, significantly impacts educational progress, overall productivity, researcher retention, and satisfaction of end users.</u> <u>Aligning programming, planning, and functional design principles within an academic and research delivery framework is crucial to the success of the user experience.</u> It is a pathway that is deliberate and guided by many tangible and intangible factors and phases. The formalization from idea to a hard asset is founded in life cycle and deeply connected to a strong stewardship mandate. Over the course of a normal life cycle span, approximately only one tenth of an asset's cost is related to its initial capitalization phase and, as such, the relevance of life cycle assessments is fundamentally important in determining and making decisions to construct, lease, or acquire new assets. A. Advance a consistent approach in optimizing space that aligns with space standards, and provides guidance on how space connects to the overall academic mission, <u>contributes to the student experience,</u> accessibility of key user groups, and unit cost impacts. B. Collaborate with <u>colleges and</u> faculties to ensure <u>infrastructure decisions are best able to reflect completion of General Space Programming (GSP) and Functional Programing (FP) to affect</u> academic planning outcomes in priority areas. 3.Stakeholders are appropriately informed and engaged when there are significant changes to <u>buildings and spaces assets.</u> Based on the resource allocations in the planning and programming phase, ensure that stakeholder engagement, principle-based outcomes and alignment to effective stewardship principles are effectively considered and executed. This will occur <u>occur</u> in a transparent and responsible manner. Excellence in planning and execution are the cornerstones to both asset management and space utilization.	

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	A. Develop a consistent approach to communications and engagement prior to any significant change to infrastructure. B. Seek input from key stakeholders Tthroughout key design implementation phases input is sought from stakeholders to ensure the multitude of institutional perspectives are acknowledged and decisions are founded in a common understanding of approved requirements, limitations, and/or compromises. C. Ensure compliance to institutional design and space operational standards as defined in university part of the Board of Governors space policy.	
Creating and Acquiring 4. Evaluate space aspirations to align within a framework of established criteria. At any given time, students, faculty, and staff will express a desire for new, expanded, or repurposed space. These requests will increasingly undergo a multitude of assessments to understand need, evaluate if stated requirements fall within a framework of established criteria, and seek assurance from leaders of the relevance and value of desired space needs. A. Facilities and Operations will provide guidance and direction to academic and business entities regarding space needs and seek endorsement of appropriate levels of leadership. B. Formal planning and design will include an evaluation framework; capital and operating budget analysis; operational impact assessment; and consideration of alternatives (renewal, lease, rebuild). Space need options will be formalized and submitted to appropriate levels of leadership for input and decision. C. Projects requiring government financial support will be prioritized, benchmarked, and submitted for consideration within the BLIMS and/or federal government submission processes.	Creating and Acquiring 4. Evaluate sSpace aspirations are to aligned within a framework of established criteria. At any given time, students, faculty, and staff will express a desire for new, expanded, or repurposed space. These requests will increasingly undergo a multitude of assessments to understand need, evaluate if stated requirements fall within a framework of established criteria, and seek assurance from leaders of the relevance and value of desired space needs. A. Facilities and Operations will pProvide guidance and direction to academic and business entities regarding space needs and seek endorsement of appropriate levels of leadership. B. Formal planning and design will iInclude an evaluation framework; capital and operating budget analysis; operational impact assessment; and consideration of alternatives in planning and design processes. (renewal, lease, rebuild). Space need options will be formalized and submitted to appropriate levels of leadership for input and decision. C. Prioritize and validate Pprojects requiring government financial support or involving additional funding partners will be prioritized, benchmarked, and submitted for consideration within the BLIMS and/or federal government submission processes.	Language/grammar edits.
Operating and Maintaining 5. Optimize operations to strategically re-invest funding to maintenance programs	Operating and Maintaining 5. Funding is Optimize operations to strategically invested in re-invest funding	Language/grammar edits.

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and/or capital renewal efforts to better manage the growing deferred maintenance liability. Operating and maintaining assets can account for up to 90 per cent of the total cost of building ownership and is comprised: support and maintenance such as administration costs (insurance, security, etc.); routine maintenance and minor repairs; custodial services; fire protection services; pest control; snow removal; grounds care; environmental operations; and utility charges (electric, gas, water). All members of the University of Alberta community can individually and collectively help meet and potentially extend the life cycle of infrastructure through understanding and adapting behaviours in how assets are used and cared for. A. Enhance preventive and predictive maintenance programming to support improved efficiencies. B. Establish campus service standards and levels and actively manage and measure across all campuses. C. Develop marketing and awareness campaigns that emphasize the role each member of the university has in stewarding and maintaining its assets. D. Advance sustainable operations' practices to support sustainability and environmental targets.	to-maintenance programs and/or capital renewal efforts to better manage the growing<u>university's</u> deferred maintenance liability. Operating and maintaining <u>infrastructure assets</u> can account for up to 90 per cent of the total cost of building ownership. and is comprised: support and maintenance such as administration costs (insurance, security, etc.); routine maintenance and minor repairs; custodial services; fire protection services; pest control; snow removal; grounds care; environmental operations; and utility charges (electric, gas, water). <u>As investments in university infrastructure provide incremental savings or instances of cost avoidance, those funds will be diverted to supporting other buildings.</u> All mMembers of the University of Alberta community can individually and collectively <u>contribute to how infrastructure is help meet and potentially extend the life cycle of infrastructure through understanding and adapting behaviours in how assets are</u> used and cared for. A. Enhance <u>predictive and</u> preventive and predictive maintenance programming to support improved efficiencies. B. Establish campus service standards and levels and actively manage and measure across all campuses. C. Develop marketing and awareness campaigns that emphasize the role each member of the university has in stewarding and maintaining its assets. D. Advance sustainable operations' practices to support sustainability and environmental targets.	
Renewing and Disposing 6.The renewal, repurposing and end-stage of assets or their components will inform decisions as part of an integrated process. Facilities and Operations will lead the optimization of capital and other asset investments to improve their use with centralized asset management and tracking. This integrated process reduces excess inventory with a clear understanding of actual needs; enables better decisions in renewal, repurposing, or replacement to avoid unnecessary expenditures; and facilitates the decommissioning and/or disposal of assets. A. Undergo a regular review of aligning all assets to the academic and	Renewing and Disposing 6.The renewal, repurposing, and end-stage of assets or their components will inform decisions as part of an integrated process. Facilities and Operations will lead the o<u>Optimizing ation of</u> capital and other <u>infrastructure asset</u> investments to improve their use with centralized asset management and tracking <u>is fundamental</u>. This integrated process reduces excess inventory with a clear understanding of actual needs; enables better decisions in renewal, repurposing, or replacement to avoid unnecessary expenditures; and facilitates the decommissioning and/or disposal of assets. A. Undergo a regular review of aligning all assets to the academic and	Language/grammar edits.

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research mission, considering prioritization criteria and guiding principles. B. Financial, space, and academic modeling will be implemented as part of the analytic framework to support choices of which buildings will undergo change. Strategic Enablers 7. Establish a strong information and analytics platform to support evidence-based decision-making. Robust, consistent, and transparent decisions can be more effectively made when the information they are based on is complete, accurate, and integrated. In order to support improved management of assets, potential investment decisions, or monitoring of performance against service levels, a strong data inventory and analytics framework is needed. A. Strengthen front line processes and information gathering to instill higher confidence in facilities' data. B. Complete technology and business needs assessments to identify integrated solutions that support business requirements. C. Build predictive modeling of key assets that consider multiple factors to the longevity and operational costs of assets. 8. Enhanced monitoring and reporting of progress will be embedded into the Facilities and Operations portfolio processes. This strategy provides Facilities and Operations a framework for the effective and efficient management of the institutions' assets. This is a living document which is relevant and integral to the daily asset management activities across the campuses. To ensure the strategy remains relevant and responsive, the following actions will be undertaken. A. Refresh the strategy as part of the annual planning cycles in place across Facilities and Operations. B. Implement quality assurance audits to ensure the integrity and cost effectiveness of data collected. C. Develop a reporting dashboard aligned with each phase of an asset's life cycle and report on progress and actions quarterly.	research mission, considering prioritization criteria and guiding principles. B. <u>Utilize F</u> financial, space, and academic modeling <u>will be implemented</u> as part of the analytic framework to support choices of which buildings will <u>(or will not)</u> undergo change. Strategic Enablers 7. <u>Establish a A</u> strong information and analytics platform <u>_to support</u>s evidence-based decision-making. Robust, consistent, and transparent decisions can <u>only</u> be <u>more effectively</u> made when the information they are based on is complete, accurate, and integrated. In order to support improved management of <u>infrastructure assets</u>, potential investment decisions, or monitoring of performance against service levels, a strong data inventory and analytics framework is needed. A. Strengthen front line processes and information gathering to instill higher confidence in facilities' data. B. Complete technology and business needs assessments to identify integrated solutions that support business requirements. C. Build predictive modeling of key assets that consider multiple factors to the longevity and operational costs of assets. 8. Enhanced monitoring and reporting of progress <u>ensures transparency and accountability. will be embedded into the Facilities and Operations portfolio processes.</u> This strategy provides <u>Facilities and Operations</u> a framework for the effective and efficient management of the institutions' assets. This is a living document which is relevant and integral to the daily asset management activities across the campuses. <u>To ensure the strategy remains relevant and responsive, the following actions will be undertaken.</u> A. Refresh the strategy as <u>necessary to reflect changing university imperatives. part of the annual planning cycles in place across Facilities and Operations.</u> B. <u>Implement Conduct</u> quality assurance audits to ensure the integrity and cost effectiveness of data collected.	

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	C. Develop a Use reporting mechanisms to dashboard aligned with each phase of an asset's life cycle and report on progress and performance, and actions quarterly.	
Next Steps Taking care of our campuses today, will provide a stronger tomorrow. This requires strategic choices of how to manage and future-proof the full life-cycle of current and future infrastructure assets. This requires support from across the university faculties, schools, departments, faculty, researchers and staff, key stakeholders, as well as with different orders of government. All stakeholders are stewards of these assets and have a direct influence on the state and care of all of them.	n/a	Moved components to Summary section.
One to Two Years In the next year, Facilities and Operations will be more evidence-driven and seek opportunities to harness innovation in how it maintains, monitors, and operates infrastructure. This includes predicting trends that will improve capital-planning decisions based on expected performance of existing infrastructure. It will also see remote sensors reporting on performance of equipment and productivity of these assets to enhance maintenance cycles and reduce overall operating costs. Space will be optimized in ways that will align with the academic and research mission while minimizing the quantity of leased space to reduce the overall operating and maintenance costs while allowing more focused and targeted investments. All new or enhanced capital infrastructure will be evaluated to establish the full life cycle costs. There will be renewal of targeted buildings where learners' needs, efficiency gains, and space optimization are evident, such as renovations of the Dentistry/Pharmacy building and Lister Hall. Land and infrastructure not core to the academic and research missions or not aligned with students' needs or support may be disposed or exchanged for other assets or developed to realize revenues for the institution. And lastly, buildings that have met the end of their life cycle, do not align with the academic and research missions, do not meet student needs' or supports, or are prohibitive to operate or maintain will be decommissioned and, in select instances, demolished.	n/a	Removed - content more applicable to the AMMP.
Three to Five Years		Removed - content more

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IAMS 2019	IAMS 2023	Comments
Over the next three to five years, Facilities and Operations will use predictive analytics to better understand performance, utilization, ecological impacts, and operating costs of assets including the impact of external events such as changing weather patterns and advances in innovation. As increasing amounts of building data is gathered by sensors and sources across all networks, assets that are 'over-maintained' and too cost intensive will be identified leading to a consideration of where alternatives may be more appropriate. There will also be a better understanding of space utilization and, where appropriate, changes to how space is used will need to be made. This will range from reductions to overall space, new configurations, or alternative lay-out and design. There will also be an increased emphasis on customer service in planning and delivery of infrastructure, including opportunities for continual feedback and satisfaction evaluations from users. This feedback will support continuous improvement throughout the full life cycle. Lastly, buildings that have reached the end of their life cycle, have increased operating and maintenance costs, and the return on investment to academia through to the financial analysis is unsustainable, will be decommissioned. And, in some instances, these buildings will be demolished if adequate and appropriate space is available elsewhere.		applicable to the AMMP.
Five to Fifteen Years In the next five to fifteen years, there will be changes in how students learn, how academia educates and trains, and there will likely be a substantive growth in the number of students attending post-secondary education. Innovation, technology, and environmental considerations will also increasingly influence asset needs and how infrastructure will be used. These changes over the years ahead will require adaptive and flexible space that more easily changes to the needs of users. Creativity will be needed now in order to accommodate for changes in the future. There are numerous impacts that will influence infrastructure decisions. One impact relates to autonomous vehicles and increased public transit potentially resulting in how the institution addresses parking and road infrastructure. This may require more sensors and cameras across the institution to support vehicle and passenger safety. Similarly, advances in alternative energy systems may result in changes to the utility grid and power systems, water collection and		Removed - content more applicable to the AMMP.

University of Alberta - Integrated Asset Management Strategy (IAMS) **REDLINE**

IAMS 2019	IAMS 2023	Comments
storage, and even energy storage. This could have a direct impact to the adjacent partners that use the University of Alberta's utility systems. Student learning spaces may shift from a 'sage on the stage' to a 'guide on the side' suggesting a greater need for more collaboration and collision space for students to work together in ways that better enable collaboration and inter-disciplinary learning. Lastly, there may be mergers or acquisitions in post-secondary that expand the volume of assets that the University of Alberta is responsible for, thereby requiring even greater discipline in space optimization and efficient use and maintenance of infrastructure. These are only a handful of the impacts that changes in the environment, the fiscal context and advancements in technology could potentially influence our infrastructure. Facilities and Operations will increasingly undergo environmental scanning, strategic foresight and risk analysis, appropriate adoption of technology, and acceleration of analytics to understand the impact of potential decisions.		
Summary The current situation is not sustainable and action is needed now. This strategy will strengthen how we care for our campuses to ensure long term resilience and sustainability. Infrastructure is an enormous collective investment and a tremendous resource for a community, society, and the economy. All members of the University of Alberta community are stewards of its buildings and grounds. The majority of assets are increasingly vulnerable to outliving their life cycle, bringing safety, student and research programming, financial enterprise risks, and escalating overall operations and maintenance costs. The current situation is not sustainable and action is needed now, therefore this Integrated Asset Management Strategy requires extensive thought, input, and action. These challenges are not insurmountable but will require dedicated resources, behaviour change, concerted focus, and purposeful collaboration. This strategy and the actions within it will strengthen how the institution cares for its assets and work toward bending the trend of growth in operations and maintenance expenditures to ensure that the institution is resilient and sustainable for the long-term. Strategic asset management will underpin all activities and investment decisions related to managing our physical infrastructure assets in order to ensure optimal outcomes that underpin the core mission.	<u>Infrastructure for Tomorrow</u> <u>In many tangible ways, a university campus replicates a small city. In the case of the University of Alberta's North Campus, 160 buildings of varying use, age, and complexity are connected by a network of streets, sidewalks, and tunnels. While comprising fewer buildings, Campus Saint-Jean, Augustana, Enterprise Square, and South Campus also each form key elements of the university's rich infrastructure mosaic.</u> <u>All decisions related to investing in campus infrastructure are naturally very long-term in nature and, in a world with limited resources, must be made prudently and with an eye clearly focused on the future. The future of world-class teaching and research. The future of memorable student experiences. A sustainable future.</u> <u>Shape, A Strategic Plan of Impact, reminds us of the imperative for us to be at the forefront of educating a growing province with global ambitions. Key to this is having and maintaining university infrastructure - classrooms, labs, libraries, study spaces, and other spaces to enhance the student experience - that meet today's expectations without constraining tomorrow's ambitions. With the necessary support of willing partners, the University of Alberta's Integrated Asset Management Strategy will get us there.</u>	Updated language.

French Version Follows

Question from GFC Elected Academic Staff Member Chris Reynolds-Chikuma on Campus Saint-Jean.

1. During the summer, the “Salle historique” (or Salle Onésime Dorval) was dismantled and artifacts dear to the Francophone community were removed without adequate community consultation. Several articles were published in local Francophone media expressing anxiety and concern about what would become of the artifacts. On Sept. 21 – that is, more than 4 months after the first artifacts were removed – a webpage was posted on the CSJ website in reaction to these articles, as well as to rumors about CSJ that had only been amplified by the sudden removal of a bilingual CSJ entry sign. The webpage provided some clarification and put forth the project of presenting Francophone heritage “within a pedagogical and educational framework,” but without sharing specific details as to how this would be accomplished. It was the first time that this project had been presented publicly. Before that, no official information had been shared by the UofA/CSJ as to where the objects were stored and what would become of them.
2. In a press interview, you said that the decision to dismantle the “Salle historique” was taken in consultation with Francophone organizations. The “CSJ is evolving” webpage mentions that there were “consultations with Indigenous, Francophone and University of Alberta officials.” In your response, you said that various consultations had been organized with staff and community members. Yet, the former president of the ACFA – the provincial association representing the Francophone community’s interests – made it clear in a recent press article (see Le Franco, Oct. 6, 2023) that he had not been consulted. In the same article, the Director of the Société Historique Francophone de l’Alberta (SHFA)– which has a mandate to protect Francophone heritage – confirmed that he had had a brief meeting with you, but added that the meeting was nothing like a consultation. Could you therefore provide the names of the Francophone organizations from which you sought advice regarding the dismantling of the “Salle historique” and the names of the other parties involved in this decision?
3. The ACFA and SHFA have been publicly engaged in various initiatives to promote diversity and decolonization and would have welcomed the idea of a proper “pedagogical presentation” of Franco-Albertan history had it been shared earlier. Why was the idea of a “pedagogical presentation” of Franco-Albertan history communicated so late in the process? Why did you not ensure the full support of the ACFA and SHFA before dismantling the “Salle historique,” given their provincial leadership roles and their expertise? Do you plan to consult with them and other interested francophone organizations at some point? If so, how do you intend to bring them back to the discussion table? Overall, would you say you are satisfied with how you communicated with the francophone community regarding the dismantling of the Salle historique?
4. If those had been Indigenous artifacts, removing them without proper consultation/communication with the people to whom they belong would rightly have been regarded as scandalous/colonial. Is it acceptable when it comes to Francophone artifacts and places of memory?

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5. Could you provide clarification as to who is in charge of digitizing and cataloguing the artifacts, specifying, for example, their level of expertise, whether they are familiar with Franco-Albertan history, if they are Francophone, whether they have worked with Francophone organizations, etc.?
6. In your answers, you say, "There will be consultations on how and where to present" the history of the Campus Saint-Jean "with a proper pedagogical framework." What do you mean exactly by "consultations"? So far, who have you "consulted" about developing this "proper pedagogical framework" and who do you intend to "consult"?
7. Have you received support and advice on how to implement decolonization at Campus Saint-Jean, given the specific history of the Francophone community (especially its strong historical bonds with Roman Catholicism and the Oblates and longstanding relationships with the Indigenous and Metis populations)? If so, could you tell us who has been advising you and in what capacity? For instance, did you seek the advice of Native Studies colleagues such as Dr. Nathalie Kermoal, whose expertise extends to the history of Francophone, Indigenous, and Metis communities in Alberta?
8. In your responses¹, you say that you "have organized several rounds of consultation involving staff and the community on the topic of inclusivity at CSJ." During these meetings, did you specifically bring up issues such as the cancellation of the "Cérémonie de la lumière"/Ceremony of lights (which was petitioned by members of the Francophone community) and the dismantling of the "Salle historique"? If not, could you specify in which venue(s) these two issues were explicitly addressed?
9. In your answers, you say: "Today's Francophonie is diverse and dynamic." From a historical standpoint, Alberta's Francophonie has always been (socially, culturally, and ethnically) diverse (see for instance N. Kermoal's book *Francophones de l'Alberta*, 2005), and all your predecessors (including the Oblates) had to find creative ways to work with this diversity. Do you think that polarizing the Francophone community – into those (Catholic Franco-Albertans) who are stuck in tradition and those who want to "evolve" – is a productive way to deal with diversity, especially since many African Francophone newcomers are Catholic, and most Franco-Albertans embraced diversity long before the UofA Strategic Plan for EDI was developed?

Response from Jason Carey, Professeur, doyen et chef de la direction / Professor, Dean and Executive Officer, Campus Saint-Jean

1. Campus Saint-Jean is the University of Alberta's francophone campus. Its main mission is to provide postsecondary education to French-speaking students, as well as carry out research and provide a cultural hub to Western Canada's francophone community.

¹ See meeting materials from October 16, 2023 <https://www.ualberta.ca/governance/member-zone/general-faculties-council/gfc-agenda-and-docs.html>

Over the summer of 2023, operational decisions were made to increase the space available to students and carry out long-needed infrastructure renovations to ensure students have adequate space to study and learn, to allow for research facilities, improve staff working conditions and ensure that students receive exceptional services from Campus Saint-Jean.

These operational decisions are taken directly by Campus Saint-Jean's leadership in the interest of the Campus. They take priority over archiving and storing historical artifacts.

2. These are operational decisions taken by Campus Saint-Jean's leadership.

As previously mentioned, between the funding announcement for important infrastructure work projects that had to be done (June 24 2022), and the actual beginning of the actual work (Fall 2022), the new leadership team had only very limited time to decide how to proceed.

Specific people and appropriate organizations within the community were thus contacted to obtain suggestions on how to urgently proceed for the historical room. ACFA is not an appropriate organization within this context, the SHFA was.

It is also important to underline a few key points: CSJ was undergoing a number of renovation projects. Because of these, it was and will again be required to move staff to a common room while the McMahon Building is renovated. The only space available large enough for the displaced staff was and is the Historical room. These types of decisions need not be discussed or require consultation as they are operational necessities. Further, in our aim to grow Campus Saint-Jean to be financially sustainable, it is imperative to effectively use our space for teaching and other mission critical activities.

3. These are operational decisions taken by Campus Saint-Jean's leadership as required by the specific situation. Campus Saint-Jean regularly invites the community to engage in consultations. The community was invited to the launch of the decolonization process, and notifications about transforming the Campus into an overall inclusive and decolonized space were already announced in April 2023. Community meetings also occurred during the Dean's community brunch in September, and recently at the Dean's community forum on November 17. We will continue to engage with the community.
4. The only objects that were removed from Campus Saint-Jean were large religious artefacts, altars that were used by the Oblates, the missionary order that managed the majority of Catholic residential schools in Canada, and were instrumental in perpetrating the cultural genocide of Indigenous peoples in Canada.

According to the Oblate order's website and apology, the missionaries perpetuated a "system which, because of its historical privilege and assumed superiority, did great damage to the Native peoples of Canada." Saint-Jean was at that time enshrined in a system that taught "the premise that European languages, traditions, and religious practices were superior to native languages, traditions, and religious practices."

https://cccb.ca/wp-content/uploads/2017/10/oblate_apology_english.pdf

We thus do not and cannot equate Oblate artifacts with Indigenous artifacts.

5. The vast majority of Saint-Jean archives having been transferred to the provincial archives and to the University archives prior to this administration, the only documents in the Salle historique were the photographs of graduating students. We will work with professional services to ensure that they are digitized and catalogued. Access will also depend on Freedom of Information and Protection of Privacy (FOIP) regulations.
6. Several more infrastructure projects have to be undertaken at Campus Saint-Jean before any decision is made on how and where the history of Campus Saint-Jean will be presented. In the meantime, regular community forums will continue to be held where members of the community will be informed about the project. These community forums are widely advertised on social media and through our community distribution lists.
7. Campus Saint-Jean has been working with a variety of partners, including Dr Florence Glanfield, Vice-Provost (Indigenous Programming and Research).
8. The "Cérémonie de la lumière" was switched to a more inclusive format following requests from students and in full agreement with the Association des Universitaires de la Faculté Saint-Jean representing CSJ's student body. It is an internal CSJ student/staff event. The community can, if it wishes to, organize its own community celebration. Feedback from the new format has been overwhelmingly positive as families who are not based in Edmonton do not have to choose between a faculty-based event and the institutional event. The new format also welcomes large families that traditionally cannot participate in our ceremonies.

The changes of the "Salle historique" are one of several steps taken in the process of Campus Saint-Jean's decolonization process that were discussed in several fora. It was a necessity brought about by the urgent infrastructure work that had to be undertaken as well as to create an inclusive learning environment for all our students.

9. The Francophone community of Alberta is in constant evolution, and has also changed widely over the past twenty years - the most recent changes in terms of inclusivity were undertaken precisely following comments of members of francophone students and discussions with a number of stakeholders (schools, school boards, organizations representing the diaspora global francophonie, and others). Campus Saint-Jean, as a University of Alberta campus, is fully committed to providing an inclusive and safe learning environment to all our students.

French version

1. *Au cours de l'été, la "Salle historique" (ou Salle Onésime Dorval) a été démantelée et des objets chers à la communauté francophone ont été enlevés sans consultation adéquate de la communauté. Plusieurs articles ont été publiés dans les médias francophones locaux, exprimant l'inquiétude et la préoccupation quant au devenir des artefacts. Le 21 septembre, soit plus de quatre mois après le retrait des premiers artefacts, une page web a été publiée sur le site de CSJ en réaction à ces articles, ainsi qu'aux rumeurs concernant CSJ qui avaient été amplifiées par le retrait soudain d'un panneau*

d'entrée bilingue de CSJ. La page web apportait quelques éclaircissements et présentait le projet de présenter le patrimoine francophone "dans un cadre pédagogique et éducatif", mais sans donner de détails spécifiques sur la manière dont cela serait réalisé. C'est la première fois que ce projet est présenté publiquement. Avant cela, aucune information officielle n'avait été communiquée par l'UofA/CSJ sur l'endroit où les objets étaient entreposés et sur ce qu'il en adviendrait.

Le Campus Saint-Jean est le campus francophone de l'Université de l'Alberta. Sa mission principale est de fournir une éducation postsecondaire aux étudiants francophones, ainsi que de mener des recherches et d'offrir un pôle culturel à la communauté francophone de l'Ouest canadien.

Au cours de l'été 2023, des décisions opérationnelles ont été prises pour augmenter l'espace disponible pour les étudiants et effectuer des rénovations d'infrastructure nécessaires depuis longtemps afin de s'assurer que les étudiants disposent d'un espace adéquat pour étudier et apprendre, de permettre des installations de recherche, d'améliorer les conditions de travail du personnel et de s'assurer que les étudiants reçoivent des services exceptionnels de la part du Campus Saint-Jean.

Ces décisions opérationnelles sont prises directement par les dirigeants du Campus Saint-Jean dans l'intérêt du Campus. Elles ont la priorité sur l'archivage et la conservation des artefacts historiques.

2. *Dans une entrevue accordée à la presse, vous avez déclaré que la décision de démanteler la " Salle historique " avait été prise en consultation avec les organismes francophones. La page web "CSJ évolue" mentionne qu'il y a eu des "consultations avec des représentants autochtones, francophones et de l'Université de l'Alberta". Dans votre réponse, vous avez dit que diverses consultations avaient été organisées avec le personnel et les membres de la communauté. Pourtant, l'ancien président de l'ACFA - l'association provinciale représentant les intérêts de la communauté francophone - a clairement indiqué dans un article de presse récent (voir Le Franco, 6 octobre 2023) qu'il n'avait pas été consulté. Dans le même article, le directeur de la Société Historique Francophone de l'Alberta (SHFA) - qui a pour mandat de protéger le patrimoine francophone - a confirmé avoir eu une brève rencontre avec vous, mais a ajouté que cette rencontre n'avait rien d'une consultation. Pourriez-vous donc nous fournir les noms des organismes francophones auxquels vous avez demandé conseil au sujet du démantèlement de la Salle historique et les noms des autres parties impliquées dans cette décision?*

Il s'agit de décisions opérationnelles prises par les dirigeants du Campus Saint-Jean.

Tel que mentionné précédemment, entre l'annonce du financement d'importants projets d'infrastructure qui devaient être réalisés (24 juin 2022) et le début réel des travaux (automne 2022), la nouvelle équipe de direction ne disposait que d'un temps très limité pour décider de la marche à suivre.

Des personnes spécifiques et des organisations appropriées au sein de la communauté ont donc été contactées pour obtenir des suggestions sur la manière de procéder de toute urgence pour la salle historique. L'ACFA n'est pas une organisation appropriée dans ce contexte, la SHFA l'était.

Il est également important de souligner quelques points clés : CSJ faisait l'objet d'un certain nombre de projets de rénovation. En raison de ces projets, il a été et sera à nouveau obligé de déplacer le personnel dans une salle commune pendant la rénovation du bâtiment McMahon. Le seul espace disponible suffisamment grand pour accueillir le personnel déplacé était et est toujours la salle historique. Ce type de décision n'a pas à être discuté ou à faire l'objet d'une consultation car il s'agit de nécessités opérationnelles. De plus, dans notre objectif de faire croître le Campus Saint-Jean pour qu'il soit financièrement viable, il est impératif d'utiliser efficacement notre espace pour l'enseignement et d'autres activités essentielles à la mission.

3. *L'ACFA et la SHFA se sont engagées publiquement dans diverses initiatives visant à promouvoir la diversité et la décolonisation et auraient accueilli favorablement l'idée d'une " présentation pédagogique " appropriée de l'histoire franco-albertaine si elle avait été partagée plus tôt. Pourquoi l'idée d'une "présentation pédagogique" de l'histoire franco-albertaine a-t-elle été communiquée si tard dans le processus ? Pourquoi ne vous êtes-vous pas assuré du plein appui de l'ACFA et de la SHFA avant de démanteler la " Salle historique ", compte tenu de leur rôle de leadership provincial et de leur expertise ? Avez-vous l'intention de les consulter, ainsi que d'autres organisations francophones intéressées, à un moment ou à un autre ? Si oui, comment comptez-vous les ramener à la table de discussion ? Dans l'ensemble, diriez-vous que vous êtes satisfait de la façon dont vous avez communiqué avec la communauté francophone au sujet du démantèlement de la Salle historique ?*

Il s'agit de décisions opérationnelles prises par la direction du Campus Saint-Jean en fonction de la situation spécifique. Le Campus Saint-Jean invite régulièrement la communauté à participer à des consultations. La communauté a été invitée au lancement du processus de décolonisation, et des notifications concernant la transformation du Campus en un espace inclusif et décolonisé ont déjà été annoncées en avril 2023. Des réunions communautaires ont également eu lieu lors du brunch communautaire du doyen en septembre et, plus récemment, lors du forum communautaire du doyen le 17 novembre. Nous continuerons à nous engager auprès de la communauté.

4. *S'il s'était agi d'artefacts indigènes, les enlever sans consultation/communication appropriée avec les personnes auxquelles ils appartiennent aurait été considéré à juste titre comme scandaleux/colonial. Est-ce acceptable lorsqu'il s'agit d'artefacts et de lieux de mémoire francophones ?*

Les seuls objets retirés du Campus Saint-Jean étaient de grands artefacts religieux, des autels utilisés par les Oblats, l'ordre missionnaire qui a géré la majorité des pensionnats catholiques au Canada et qui a contribué à perpétrer le génocide culturel des peuples autochtones du Canada.

Selon les excuses sur le site Internet de l'ordre des Oblats, les missionnaires ont perpétué un "système qui, en raison de son privilège historique et de sa supériorité présumée, a fait beaucoup de tort aux peuples autochtones du Canada". À l'époque, Saint-Jean faisait partie d'un système qui enseignait "la prémisse selon laquelle les langues, les traditions et les pratiques religieuses européennes étaient supérieures aux langues, aux traditions et aux pratiques religieuses autochtones".

Nous ne pouvons donc pas assimiler les artefacts oblats aux artefacts autochtones.

https://cccb.ca/wp-content/uploads/2017/10/oblate_apology_english.pdf

5. *Pourriez-vous préciser qui est responsable de la numérisation et du catalogage des artefacts, en spécifiant, par exemple, leur niveau d'expertise, s'ils sont familiers avec l'histoire franco-albertaine, s'ils sont francophones, s'ils ont travaillé avec des organismes francophones, etc.*

La grande majorité des archives de Saint-Jean ayant été transférées aux archives provinciales et aux archives de l'Université avant cette administration, les seuls documents de la Salle historique étaient les photographies des étudiants finissants. Nous travaillerons avec des services professionnels pour assurer la numérisation et le catalogage de ces documents. L'accès à ces documents dépendra également de la réglementation relative à la liberté d'information et à la protection de la vie privée (Freedom of Information and Protection of Privacy - FOIP).

6. *Dans vos réponses², vous dites : " Il y aura des consultations sur comment et où présenter " l'histoire du Campus Saint-Jean " avec un cadre pédagogique approprié ". Qu'entendez-vous exactement par "consultations" ? Jusqu'à présent, qui avez-vous "consulté" au sujet de l'élaboration de ce "cadre pédagogique approprié" et qui avez-vous l'intention de "consulter" ?*

Plusieurs autres projets d'infrastructure doivent être entrepris au Campus Saint-Jean avant qu'une décision ne soit prise sur la façon dont l'histoire du Campus

² Veuillez consulter les documents de la rencontre du 16 octobre, 2023

<https://www.ualberta.ca/governance/member-zone/general-faculties-council/gfc-agenda-and-docs.html>

Saint-Jean sera présentée et sur l'endroit où elle le sera. Entre-temps, des forums communautaires réguliers continueront d'être organisés afin d'informer les membres de la communauté sur le projet. Ces forums communautaires sont largement annoncés sur les médias sociaux et par l'entremise de nos listes de distribution communautaires.

7. *Avez-vous reçu du soutien et des conseils sur la façon de mettre en œuvre la décolonisation au Campus Saint-Jean, compte tenu de l'histoire particulière de la communauté francophone (notamment ses liens historiques étroits avec le catholicisme romain et les Oblats et ses relations de longue date avec les populations autochtones et métisses) ? Dans l'affirmative, pourriez-vous nous dire qui vous a conseillé et à quel titre ? Par exemple, avez-vous demandé l'avis de collègues en études autochtones comme Nathalie Kermoal, dont l'expertise s'étend à l'histoire des communautés francophones, autochtones et métisses de l'Alberta ?*

Le Campus Saint-Jean a travaillé avec divers partenaires, dont Florence Glanfield, vice-provost (programmation et recherche autochtones).

8. *Dans vos réponses, vous dites que vous avez "organisé plusieurs séries de consultations impliquant le personnel et la communauté sur le sujet de l'inclusion à CSJ". Au cours de ces réunions, avez-vous spécifiquement soulevé des questions telles que l'annulation de la "Cérémonie de la lumière" (qui a fait l'objet d'une pétition de la part de membres de la communauté francophone) et le démantèlement de la "Salle historique" ? Si ce n'est pas le cas, pourriez-vous préciser dans quel(s) lieu(x) ces deux questions ont été explicitement abordées ?*

La "Cérémonie de la lumière" a été transformée en un format plus inclusif à la demande des étudiants et en plein accord avec l'Association des Universitaires de la Faculté Saint-Jean qui représente le corps étudiant de CSJ. Il s'agit d'un événement interne pour les étudiants et le personnel de CSJ. La communauté peut, si elle le souhaite, organiser sa propre célébration communautaire. Les réactions à ce nouveau format ont été extrêmement positives, car les familles qui ne sont pas basées à Edmonton n'ont pas à choisir entre un événement organisé par la faculté et un événement institutionnel. Le nouveau format accueille également les familles nombreuses qui, traditionnellement, ne peuvent pas participer à nos cérémonies.

Les changements apportés à la Salle historique sont l'une des nombreuses étapes du processus de décolonisation du Campus Saint-Jean qui ont été discutées dans plusieurs forums. Il s'agissait d'une nécessité découlant des travaux d'infrastructure urgents qui devaient être entrepris ainsi que de la création d'un environnement d'apprentissage inclusif pour tous nos étudiants.

9. *Dans vos réponses, vous dites : "La francophonie d'aujourd'hui est diversifiée et dynamique. D'un point de vue historique, la francophonie albertaine a toujours été (socialement, culturellement et ethniquement) diversifiée (voir par exemple le livre de N.*

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Kermoal, Francophones de l'Alberta, 2005), et tous vos prédécesseurs (y compris les Oblats) ont dû trouver des façons créatives de travailler avec cette diversité. Pensez-vous que la polarisation de la communauté francophone - entre ceux (les Franco-Albertains catholiques) qui sont coincés dans la tradition et ceux qui veulent " évoluer " - est une façon productive de traiter la diversité, surtout que de nombreux nouveaux arrivants africains francophones sont catholiques et que la plupart des Franco-Albertains ont embrassé la diversité bien avant l'élaboration du plan stratégique de l'UofA pour l'IDE ?

La communauté francophone de l'Alberta est en constante évolution et a aussi beaucoup changé au cours des vingt dernières années. Les changements les plus récents en matière d'inclusion ont été entrepris précisément à la suite des commentaires des membres des étudiants francophones et des discussions avec un certain nombre d'intervenants (écoles, conseils scolaires, organismes représentant la francophonie mondiale de la diaspora, et autres). Le Campus Saint-Jean, en tant que campus de l'Université de l'Alberta, s'engage pleinement à offrir un environnement d'apprentissage inclusif et sécuritaire à tous ses étudiants.

Question from GFC Elected Academic Staff Member Ryan Dunch on the [Maclean's ranking of universities in Canada](#), released on October 12, 2023.

There are some successes for particular programs in the [Maclean's ranking of universities in Canada](#), released on October 12, 2023, but overall it is not great news for the University of Alberta.

A drop from #5 to #6 in medical/doctoral universities – below the usual three or four, but also below an institution we have not previously seen as a peer institution (the University of Ottawa – for information but not for the public version of the question).

Some of the lower among the Maclean's variables:

#11 in library spending

#9 in faculty student ratio. Note that there is a big spread between the top 6, all of which have ratios between 15 and 21 (including the University of Calgary), and our number of 25.8 students per faculty member.

#15 in spending on student services – the #1 institution is at 6.1% of operating expenditures, and we are at 2.7%

Which of these variables and measures will be improved under *SHAPE*, and which might be worsened?

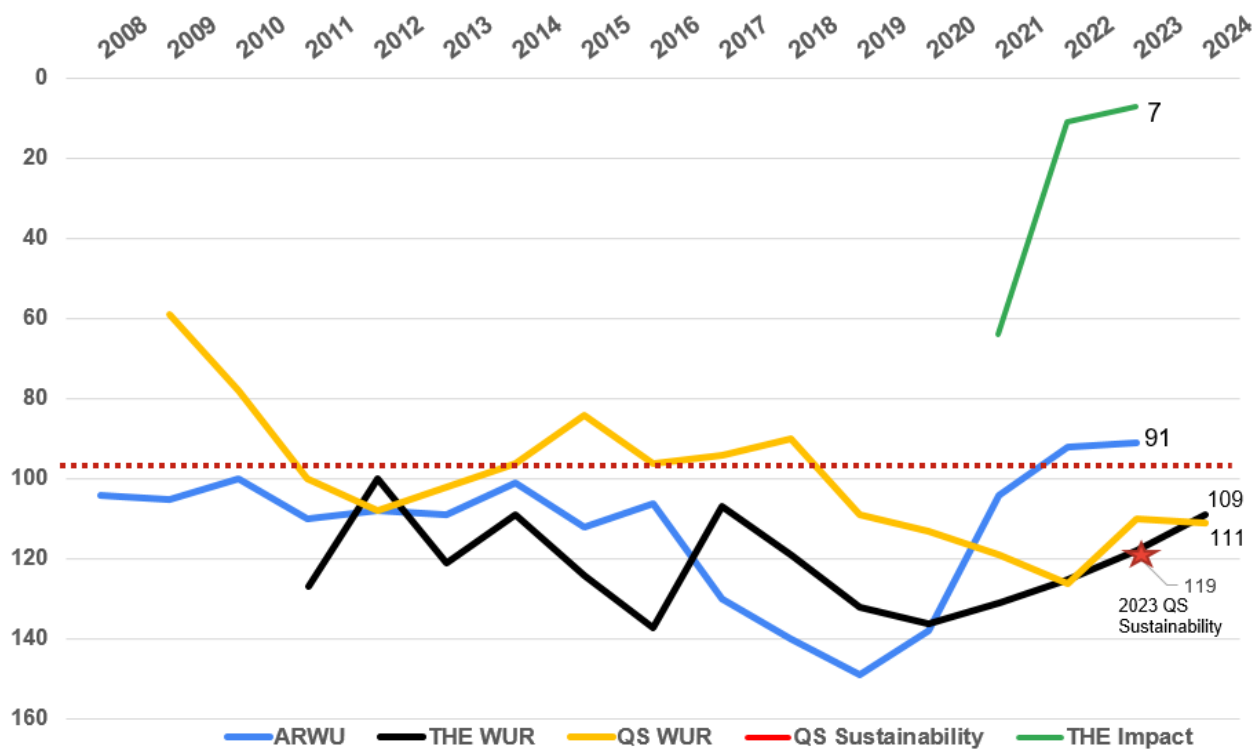
In particular, are you concerned that the *SHAPE* plan for enrollment growth will place additional pressure on our student/faculty ratio, and on metrics like spending on student services?

In relation to enrollment growth, have you had any formal indication from the Government of Alberta that Cabinet is ready to fund an enrollment increase at the University of Alberta on the scale outlined in *SHAPE*?

Response from Elan MacDonald, Vice-President (External Relations) & Verna Yiu, Interim Provost and Vice-President (Academic)

Which of these variables and measures will be improved under SHAPE, and which might be worsened? In particular, are you concerned that the SHAPE plan for enrollment growth will place additional pressure on our student/faculty ratio, and on metrics like spending on student services?

There are more than 25 international university rankings where the University of Alberta is consistently ranked among the top four to five Canadian universities. Each of these rankings has different measures that make up their rankings. For example, most include high percentages of bibliometric indicators. The Maclean's ranking does not include bibliometric indicators. This year, in the three most visible rankings, the U of A ranked fourth in Canada in the Shanghai Rankings (ARWU), fifth in the Times Higher Education's World University Ranking, and fourth in QS World University Ranking. Our university's ranking trend internationally and nationally in important rankings is great news. Please see the graph below showing the U of A's world ranking performance improvements in recent years.



Notwithstanding that Maclean's ranking of universities in Canada is a regional ranking; it is an important ranking within Canada for student recruitment and Canadian reputation. In recent years, the U of A has ranked fifth or sixth in the Macleans ranking. SHAPE, our new strategic plan, has the vision of the U of A ranked as top three in Canada. As Maclean's is an important Canadian ranking, our updated rankings strategy includes a Maclean's strategy to improve our performance

In the next ten years, as noted in SHAPE, the university aspires to be top three in the U15 sponsored research ranking. With the current Maclean ranking methodology, this will directly positively affect 20% (12% for SSHRC, NSERC and CIHR dollars and 8% for total research dollars) of the current ranking and indirectly another 38% (student awards 10%, faculty awards 8%, and reputation 20%). In the longer-term, if we achieve the vision in SHAPE, we could see positive impacts across all the 12 indicators.

In relation to enrollment growth, have you had any formal indication from the Government of Alberta that Cabinet is ready to fund an enrollment increase at the University of Alberta on the scale outlined in SHAPE?

The Government of Alberta has not yet announced their formal plans for enrollment growth expansion. The October 30, 2023, Speech From the Throne included a statement that the province must "significantly expand" the number of post-secondary spaces due to Alberta's population growth, so we can anticipate that funding should be made available for enrollment expansion. We do not yet know how much funding will be made available, how many overall new spaces the government intends to fund, or how targeted this expansion effort will be. These

details may be announced following the release of the 2024/25 provincial budget in Spring 2024.

The University of Alberta continues to advocate for university priorities, such as enrollment growth, with senior and elected officials with the provincial government.

**ITEM NO. 10**Decision ☐ Discussion ☒ Information ☐

ITEM OBJECTIVE: The report provides details on the financial support administered by the Office of the Registrar and the Faculty of Graduate and Post-doctoral Studies for fiscal year 2022/23, giving details on spending for domestic, Indigenous, international, and graduate financial support expenditures. The associated overview gives a quick reference of statistics and figures.

DATE	November 20 th , 2023
TO	General Faculties Council
RESPONSIBLE PORTFOLIO	Office of the Registrar and Faculty of Graduate and Post-doctoral Studies

EXECUTIVE SUMMARY:Background

In the attached report, the Office of the Registrar and the Faculty of Graduate and Post-doctoral Studies provide a snapshot of the current state of undergraduate and graduate financial supports issued in the 2022/23 fiscal year.

Annual reporting to administrative and governance committees on student financial support is part of the RO's and FGPS's commitment to providing reporting and information on matters affecting student success on campus, and meets the reporting requirements outlined in the UAPPOL Undergraduate Student Financial Support Procedure.

Analysis / Discussion

This year, changes were made to the report, include comprehensive data on graduate merit-based financial supports and the addition of spending on hybrid awards (financial supports intended to proactively offset costs for students in need or students in equity-denied groups). The report highlights some of the strategies implemented to manage the many challenges students face, including inflation and its impact of the rising cost of living. Also is a section on "What's Next", which outlines the work the RO and FGPS has been doing with respect to Equity, Diversity, and Inclusion initiatives, affordability initiatives and service excellence initiatives.

Risk Discussion / Mitigation of the Risk

Annual reporting on Student Financial Support provides the community with an update on data and trends and allows for transparency on the stewardship of the financial resources spent in this area.

Where applicable, list the legislation that is being relied upon:

UAPPOL Student Financial Supports Policy

GOVERNANCE OUTLINE



ITEM NO. 10

Supporting Materials:

Student Financial Support Annual Report To Our Community (pages 1 – 21)

Overview – Annual Report on Student Financial Support (pages 21-25)



ITEM NO. 10

SCHEDULE A:

Engagement and Routing

Consultation and Stakeholder Participation / Approval Route (parties who have seen the proposal and in what capacity) <[Governance Resources Section Student Participation Protocol](#)>

Those who are actively participating:

- Norma Rodenburg, Acting Vice Provost and University Registrar
- Anna Hughes, Associate Registrar
- Fiona Halbert, Assistant Registrar Student Financial Support
- Roger Epp, Interim Dean Faculty of Graduate Studies & Research
- Bobbi Schiestel, Faculty General Manager Faculty of Graduate Studies & Research

Those who have been consulted:

-

Those who have been informed:

- Janice Causegrove-Dunn, Vice Provost Programs: October 3, 2023
- Kelly Spencer, Associate Vice-President, VER Development and Alumni Relations: October 3, 2023
- Edith Finczak, Office of the Provost and Vice-President (Academic): October 3, 2023
- Melissa Padfield, Deputy Provost (Students and Enrolment): October 3, 2023
- Kathleen Brough, Provost Office Chief of Staff: October 3, 2023
- Carley Roth, Portfolio Initiatives Manager: October 3, 2023
- Florence Glanfield, Vice-Provost Indigenous Programming & Research: October 3, 2023
- Evelyn Hamdon, Senior Advisor, Equity & Human Rights: October 3, 2023
- Ravina Sanghra, Dean of Students: October 3, 2023
- Shana Dion, Assistant Dean FNMI Student Services: October 3, 2023
- Anastasia Lim, Government & Community Relations: October 3, 2023
- Cen Huang, Vice Provost and AVP International: October 3, 2023
- Doug Weir, Executive Director, Global Learning and COO, University of Alberta International: October 3, 2023
- Christian Fotang, Students' Union President: October 3, 2023
- Bishoi Aziz, Graduate Students' Association President: October 3, 2023

Approval Route:

Provost's Council: Oct 16, 2023

PEC-O: Oct 26, 2023

Advisory Committee on Undergraduate Financial Support (ACUS): Oct 27, 2023

Advisory Committee on Enrolment Management (ACEM): Oct 27, 2023

Dean's Council: Nov 1, 2023



ITEM NO. 10

APC: Nov 1, 2023

COSA: Nov 2, 2023

GFC: Nov 20, 2023

BLRSEC: Nov 24, 2023

BFPC: Nov 28, 2023

Supplementary Notes / Context:



UNIVERSITY
OF ALBERTA

Annual Report

TO OUR COMMUNITY

Student Financial Support
2022/23

Date:
SEPTEMBER 2023



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The University of Alberta, its buildings, labs and research stations are primarily located on the traditional territory of Cree, Blackfoot, Métis, Nakota Sioux, Iroquois, Dene and Ojibway/ Saulteaux/Anishinaabe nations; lands that are now known as part of Treaties 6, 7 and 8 and homeland of the Métis. The University of Alberta respects the sovereignty, lands, histories, languages, knowledge systems and cultures of First Nations, Métis and Inuit nations.

MESSAGE FROM THE VICE-PROVOST AND UNIVERSITY REGISTRAR AND VICE-PROVOST AND DEAN, FACULTY OF GRADUATE STUDIES AND RESEARCH

The 2022/23 Student Financial Support Annual Report to our Community provides an overview of student financial support at the University of Alberta. To support our core mission of operating as One University, this is the first time the report has been jointly produced by both the Office of the Registrar (RO) and the Faculty of Graduate Studies and Research (FGSR) since it was initiated in 2016. Complementing the Report to our Community is the comprehensive 2022/23 Student Financial Support Annual Report.

The 2022/23 Annual Report to our Community highlights some of the strategies implemented to manage the many challenges students face, including inflation and its impact on the rising cost of living. Recognizing that student financial need is increasing and financial resiliency is also changing for students due to the lasting impacts of COVID-19, we continue to address and work to reduce financial barriers for both undergraduate and graduate students. Some of the key supports we focused on in 2022/23 are reflected in this report:

- In addition to bursaries, our commitment to accessibility includes the continued implementation of the Discover University of Alberta Award and the Turtle Spirit Pathway Award for First Nations, Métis and Inuit Students, both designed to provide funding to undergraduate students with demonstrated financial challenges and barriers.
- The President's International Distinction Scholarship, a large and renewable scholarship that provides \$120,000 over four years to qualified students, is a new recruitment scholarship strategy that has increased the university's competitiveness and promotes diversity among our international students. The number of international students who applied with admission averages of 95 per cent or higher and registered grew by 38 per cent.
- Last year, we also provided financial supports, including living allowance and waiving of the 2022/23 tuition fees, for any Ukrainian Study Permit holders who were suffering financial hardship due to the war. Funding for Ukrainian students was provided in partnership with the Advanced Education through the *Supports for Displaced Post-secondary Ukrainian Students in Alberta* grant agreement.
- FGSR continues its work on a proposal for guaranteed minimum funding for PhD students. We know that doctoral students — many with dependents — face increasing financial hardship in the face of the inflationary pressures of recent years. A minimum funding guarantee is a critical investment in the research and teaching mission of the University. Ensuring we can attract strong students is also a matter of ethical obligation to those we admit and a practical and effective way to increase equity, diversity and inclusion within PhD cohorts, since access to funding has been shown to be a significant barrier to those who are less sure that doctoral studies are for people like them.

As always, we will assess and improve our programs to ensure student access to financial support is simple and efficient and benefits students and the university for years to come.

Sincerely,



Norma Rodenburg

Acting Vice-Provost and University Registrar



Dr. Roger Epp

Interim Vice-Provost and Dean,
Faculty of Graduate Studies and Research

OVERVIEW OF STUDENT FINANCIAL SUPPORT

Recognizing that student financial need is increasing and financial resiliency is also changing for students due to the lasting impacts of COVID-19 and the rising cost of living, we maintain a strong and evolving commitment to the financial support of our undergraduate and graduate students. The UAPPOL Student Financial Supports Policy (2019) guides our decision-making and how financial supports are administered.

UAPPOL Student Financial Supports Policy (2019)

The University of Alberta is committed to providing and optimizing robust student financial supports, in order to ensure that academically qualified students can attend the university. These student financial supports will align with institutional priorities and values, including those outlined in the institutional strategic plan. The University recognizes that access to affordable education is a shared responsibility between the University, the student, and government¹.

¹ Shared responsibility differs between international and domestic students. International students requiring Study Permits have an expectation of sufficient funding per Canada Study Permit Requirements. For domestic students, the expected family contribution differs from international students and family income is a standard measure used by provincial and federal governments.

FINANCIAL SUPPORT ADMINISTERED BY THE REGISTRAR'S OFFICE AND FACULTY OF GRADUATE STUDIES AND RESEARCH

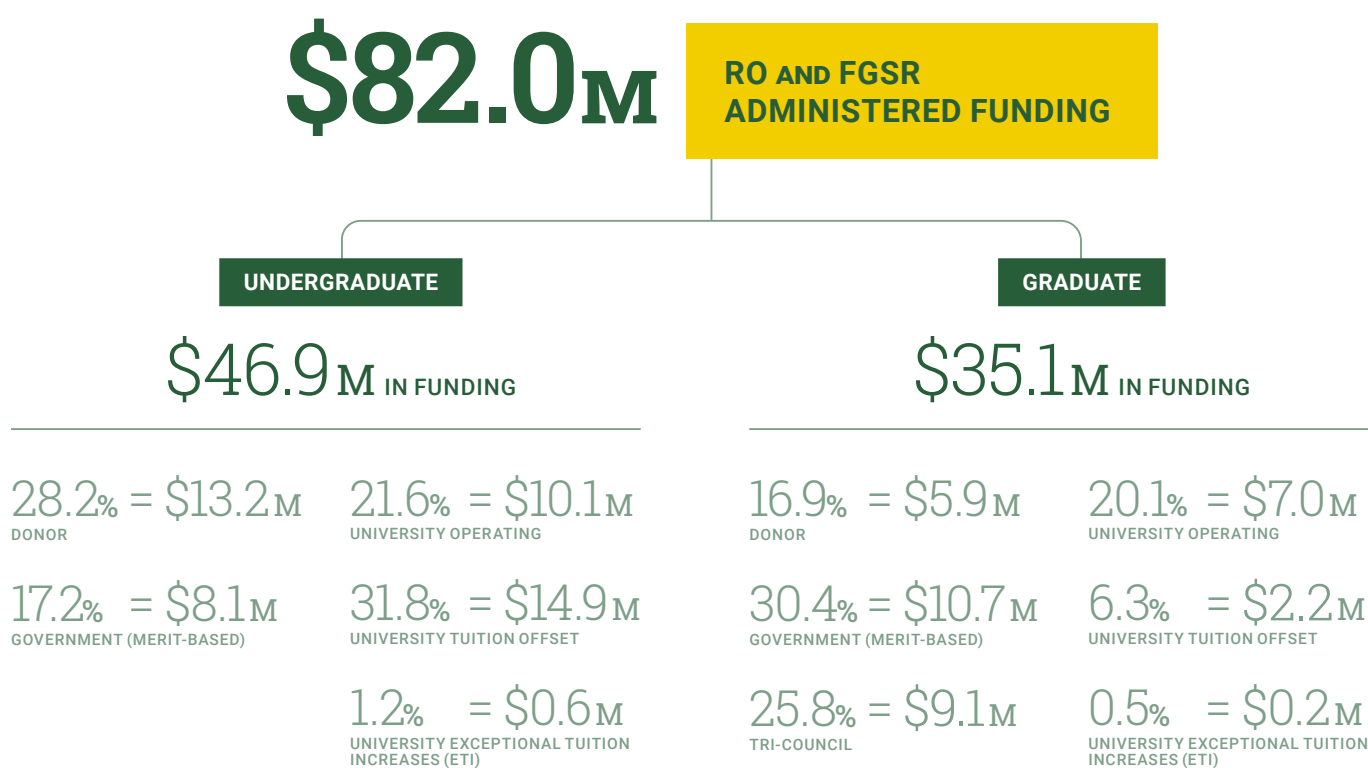
Funding sources include:

- Donor
- Government (merit-based)
- Tri-Council²
- University operating
- University tuition offset
- Exceptional Tuition Increases (ETI)

TOTAL ADMINISTERED FINANCIAL SUPPORT

In 2022/23, \$81.99M in financial support was administered to undergraduate and graduate students. \$46.9M in funding was administered to undergraduate students, a 15.5 per cent increase year-over-year in total funding. \$35.1M in funding was administered to graduate students. Due to the fact that this is the first time graduate merit-based funding is being included in this report, a year-over-year comparison is not possible.

FIGURE 1: TOTAL ADMINISTERED FINANCIAL SUPPORT 2022/23



² Applies to graduate funding only.

FINANCIAL SUPPORT: MERIT VS NEED

Merit-based student financial supports include, but are not limited to: awards, scholarships, prizes and University medals. Merit-based financial supports are competitive; successful completion of the requirements does not guarantee receipt of the funding.

Need-based student financial supports include, but are not limited to: bursaries, loans and emergency funding.

Hybrid student financial supports are awards whose primary selection criteria is a combination of both undergraduate academic performance and indicated financial need. Hybrid awards also support students from equity-denied groups. Reporting on hybrid awards is new for 2022/23.

Of the \$46.9M spent on undergraduate students, 66.8 per cent (\$31.3M) went to merit-based supports, 26.3 per cent (\$12.3M) went to need-based supports and 6.8 per cent (\$3.2M) went to hybrid supports.

Of the \$35.1M spent on graduate students, 88.7 per cent (\$31.1M) went to merit-based supports, 10.3 per cent (\$3.6M) went to need-based supports and 0.9 per cent (\$333,150) went to hybrid supports.

Overall, 76.2 per cent of funding went to merit-based supports, 19.5 per cent to need-based supports and 4.3 per cent went to hybrid supports. Of the \$62.5M spent on merit-based supports, 73.8 per cent (\$60,394,923) went to domestic students and 26.3 per cent (\$121,595,501) went to international students. Domestic students make up 81 per cent of total enrolment (undergraduate and graduate), so this proportion is close to total enrolment. Of the \$15.97M spent on need-based supports, 74.2 per cent (\$11,847,221) went to domestic students and 25.8 per cent (\$4,120,463) went to international students.

FIGURE 2: FINANCIAL SUPPORT BY FINANCIAL SUPPORT TYPE 2022/23

RO AND FGSR ADMINISTERED FUNDING	UNDERGRADUATE	GRADUATE
\$81,990,424	\$46,892,169	\$35,098,255
TOTAL ADMINISTERED FUNDING	TOTAL ADMINISTERED FUNDING	TOTAL ADMINISTERED FUNDING
76.2% = \$62,491,800	66.8% = \$31,346,015	88.7% = \$31,145,785
MERIT-BASED	MERIT-BASED	MERIT-BASED
19.5% = \$15,967,684	26.3% = \$12,348,365	10.3% = \$3,619,319
NEED-BASED	NEED-BASED	NEED-BASED
4.3% = \$3,530,939	6.8% = \$3,197,789	0.9% = \$333,150
HYBRID	HYBRID	HYBRID

Three words come to mind when I reflect on the scholarships I have been awarded: security, motivation and pride. I feel secure not having to worry about financial burdens while at university, allowing me to immerse myself in the school environment and enjoy my time on campus. I am motivated to continue to achieve high GPAs every year and continue working hard even as my classes progress in difficulty. Finally, I can look back at university with a sense of pride at my accomplishments, knowing I have been seen for my efforts.

Chloe, Faculty of Education | Edmonton

NEED-BASED SPENDING³

In 2022/23, \$15.97M was issued through need-based supports. This represents a 19.4 per cent increase in the total amount of need-based funding issued compared to 2021/22.

- 74.2 per cent (\$11,847,221) of need-based funding went to domestic students; 25.8 per cent (\$4,120,463) went to international students.
- 77.3 per cent (\$12,348,365) of need-based funding went to undergraduate students; 22.7 per cent (\$3,619,319) went to graduate students.

FIGURE 3: NEED-BASED SPENDING BY CITIZENSHIP STATUS 2022/23



77.5 per cent of need-based spending came from university sources (operating and tuition offsets).

- 29.3 per cent university operating (\$4,677,499)
- 47.3 per cent tuition offset (\$7,560,628)
- 0.9 per cent ETI (\$138,000)
- 22.5 per cent donor (\$3,591,556). Donor includes Access Fund Bursary and Graduate Students' Association (GSA) funding.

International students recruited abroad and international students whose last school attended was in Canada may receive financial supports which are primarily merit-based, funded by the international tuition offset where 7.55 per cent of international student tuition revenue is allocated to international student financial supports. The expectation from both the Government of Canada and the university is that international students have the capacity to fund the full cost of their education. As such, the tools we deploy for financial support are influenced by this reality. The RO and University of Alberta International (UAI) collaborate to administer the merit-based program and need-based programs to support international access, yield and retention.

³ Need-based spending represents RO-administered funding.

NEED-BASED DEMAND AND ENROLMENT

In 2022/23, 1,370 students received bursary funding. This accounts for 3.1 per cent of total enrolment. 123 more students (9.9 per cent) received bursaries in 2022/23 compared to 2021/22. The rising cost of living and student financial resiliency (i.e., savings or other forms of financial support to deal with emergencies) are both contributing factors to the increase.

The university continues to work to meet students' financial need with annual maximums for bursaries in addition to hybrid funding awarded through merit-based programs to students indicating financial need and/or who are from equity-denied groups.

All students with an assessed financial shortfall received bursary funding in 2022/23.
No eligible students were denied bursary support.

FIGURE 4: BURSARY DEMAND AND TOTAL ENROLMENT

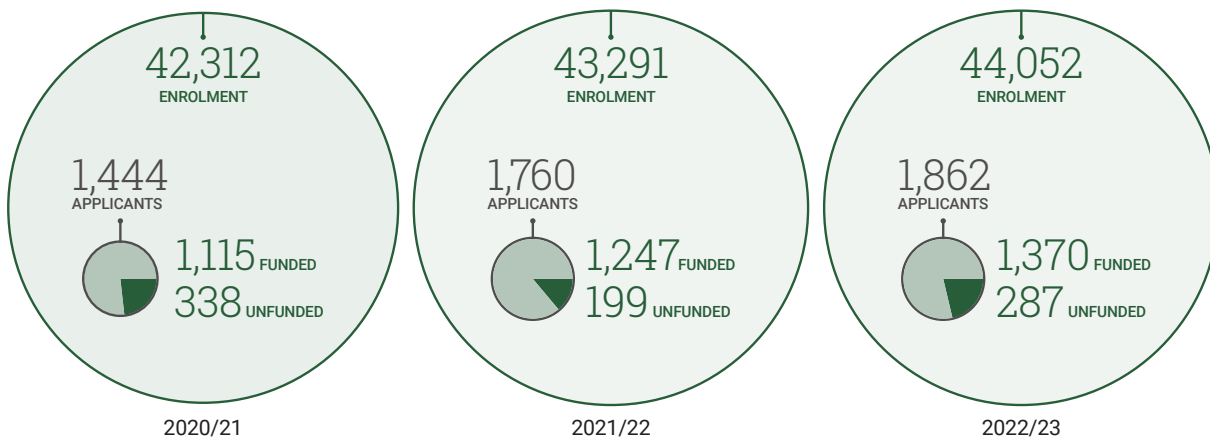


TABLE 1: BURSARY DEMAND AND TOTAL ENROLMENT BY PROGRAM TYPE

	2020/21		2021/22		2022/23	
	Undergraduate	Graduate	Undergraduate	Graduate	Undergraduate	Graduate
Enrolment	34,108	8,204	34,889	8,402	35,628	8,424
Applicants	1,121	323	1,312	335	1,583	379
Funded	869	246	981	266	1,086	284
Unfunded Financial Shortfall	260	78	151	48	212	75

Average Cost 2022/23

- Moderate Standard of Living + Average Tuition=\$25,300

Average Bursary was \$11,016

- Increased by 7.4 per cent compared to 2021/22

For students facing financial shortfalls, on average 43.5 per cent of the cost to attend university is covered by bursary support.

Unfunded financial shortfall is defined as the dollar amount of assessed financial shortfall per student that remained after the maximum bursary values were applied. In 2022/23, 0.65 per cent of the total undergraduate and graduate enrolment (287 students) had an unfunded financial shortfall. The number of students with an unfunded financial shortfall increased by 88 students.

Of the 287 students with an unfunded financial shortfall in 2022/23, 201 students were domestic (0.56 per cent of domestic enrolment) and 86 students were international (1.02 per cent of international enrolment).

73.6 per cent of graduate bursary recipients had their financial shortfall met with bursary funding, leaving 0.89 per cent of the total graduate enrolment (75 students) with an unfunded financial shortfall.

80.5 per cent of undergraduate bursary recipients had their financial shortfall met with bursary funding, leaving 0.6 per cent of the total undergraduate enrolment (212 students) with an unfunded financial shortfall.

TABLE 2: UNFUNDED FINANCIAL SHORTFALL

Student Type	Number of Students	Dollar Amount	% of Total Amount
Undergraduate non-professional	110 (0.33% of enrolment)	\$657,251	15.5%
Undergraduate professional	102 (4.58% of enrolment)	\$2,745,804	64.8%
Graduate	75 (0.89% of enrolment)	\$834,837	19.7%
Total	287	\$4,237,893	100.0%

STEWARDSHIP

The RO continues to be strong stewards of institutional resources. In 2022/23, 100.1 per cent of revenue collected through the university tuition offsets was spent.

103.2 per cent of international tuition offset revenue and 94.6 per cent of domestic tuition offset revenue was spent in 2022/23.

TABLE 3: UNIVERSITY TUITION OFFSET REVENUES AND SPENDING, 2022/23

Revenue Type	Total Offset Revenue	Undergraduate	Graduate	Total Spend	% of Total
Domestic	\$6,200,000	\$5,270,004	\$597,800	\$5,867,804	94.6%
International	\$10,900,000	\$9,635,595	\$1,613,000	\$11,248,595	103.2% ⁴
Tuition Offset Total	\$17,100,000	\$14,905,599	\$2,210,800	\$17,116,399	100.1%

The RO holds administrative responsibility for 1,852 endowments. Collectively, the market value of all these endowments (as at March 31, 2022) was \$292,831,819.63. The RO continuously seeks to maximize spending of our donor endowed funds.

The RO continuously monitors donor spending to ensure spending of endowments aligns with university policy and institutional goals to maximize spending of annual earnings. 1,712 (94 per cent) of RO held endowments with available spending had at least 75 per cent of the spending allocation expended in 2022/23. The RO will continue to seek to maximize spending of endowed financial supports. The RO will also continue to work closely with the Office of Advancement to support donor spending.

⁴ Prior year carryforwards balances were used to account for this overspend. No deficit was incurred.

PARTNERSHIPS

Partnerships between provincial and federal governments primarily focus on domestic students and relate to government loans, RESPs and employment opportunities which are more accessible to domestic students. For domestic students, it is most common for the expected family contribution to post-secondary education be calculated by family income. Provincial and federal government loans and grants also play an integral part of student financial support. Loans continue to be important support that are fundamental to increasing access to education.

For international students, the expectation from both the Government of Canada and the university is that they have the capacity to fund the full cost of their education. The RO administers one international loan program, the U.S. Direct Loans Program, to support students with U.S. citizenship. The RO administered \$336,769 to 25 students in 2022/23.

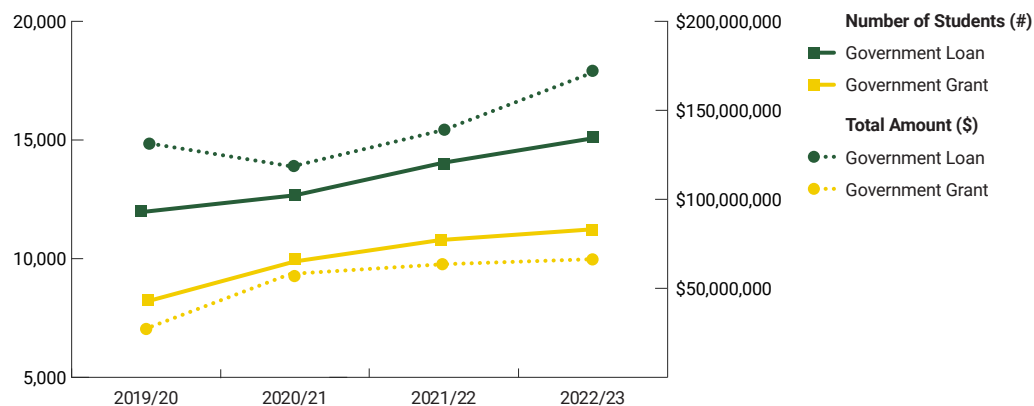
In 2022/23, 15,070 domestic undergraduate students received financial support through the provision of Canadian government loans (both federal and provincial) for a total of \$171,205,628. 49 per cent of all domestic undergraduate students accessed government loans with relatively even distribution across years of study.

In 2022/23, the number of undergraduate students accessing loans and the total value of loans accessed increased by 7 per cent (1,024 students) and 23 per cent (\$32.2M) respectively, with the average amount per student increasing by \$1,473. This increase could be attributed to increases in annual loan maximums provided by governments.

Government grant funding is non-repayable funding issued by provincial and federal granting agencies. Government grants support students from diverse backgrounds (students from low-income families, students with dependents and students with disabilities) to encourage participation in post-secondary education.

In 2022/23, 81 per cent of Alberta undergraduate loan borrowers received some type of grant funding. 11,094 domestic undergraduate students received an income-based grant which is primarily comprised of federal funding. This represents 42 per cent of Alberta students.

FIGURE 5: ALLOCATION OF GOVERNMENT LOAN AND GRANT FUNDS AMONG DOMESTIC UNDERGRADUATES



Source: Office of the Registrar

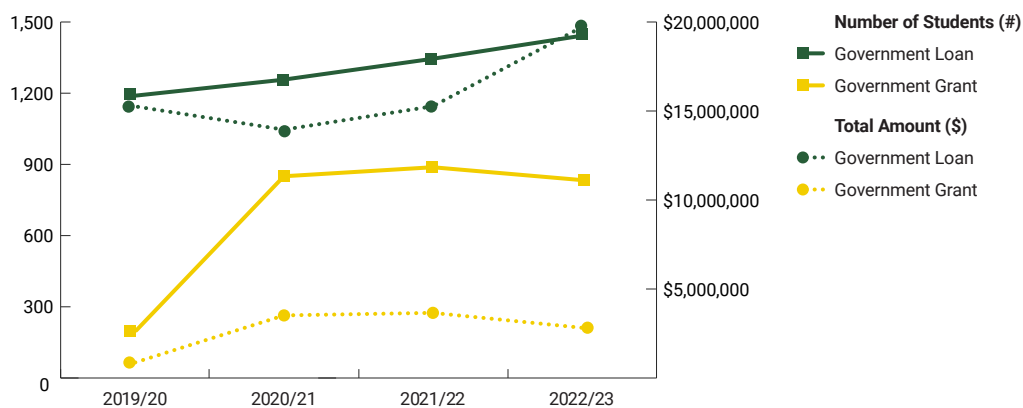
Notes:

1. The grant funding information is reflective of the grants issued to students receiving loans through Alberta Student Aid.
2. In 2020/21, maximum grant amounts funded by the federal government doubled compared to prior years. The federal government's maximums were maintained for 2022/23.

1,442 domestic graduate students received \$19.7M in government loans, a 29 per cent (\$4.4M) increase from the prior year. Fewer graduate students (6 per cent or 54 students) received government grant funding in 2022/23.

29 per cent (1,442) of domestic graduate students accessed government loan funding and 17 per cent (834) received government grants.

FIGURE 6: ALLOCATION OF GOVERNMENT LOAN AND GRANT FUNDS AMONG DOMESTIC GRADUATES



Source: Office of the Registrar

Notes:

1. The grant funding information is reflective of the grants issued to students receiving loans through Alberta Student Aid.
2. In 2020/21, maximum grant amounts funded by the federal government doubled compared to prior years. The federal government's maximums were maintained for 2022/23.

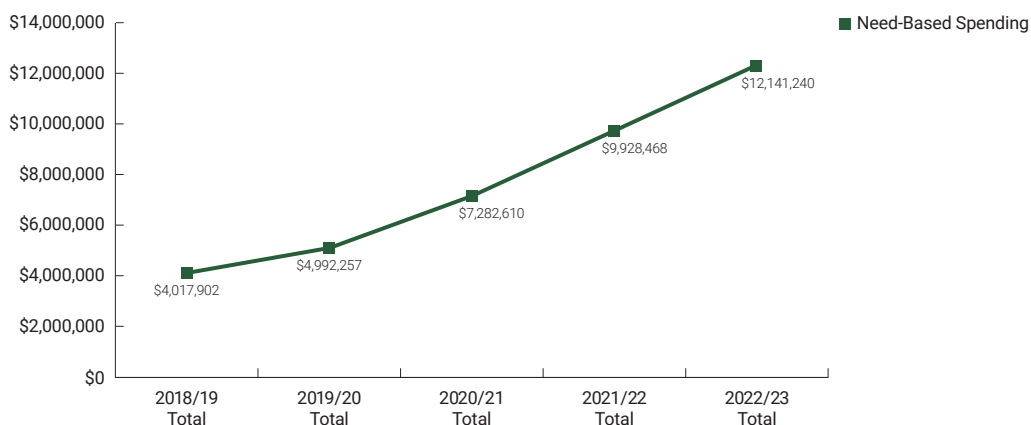
ACCESS

Access to university is a strategic priority for the university. It aligns with our Equity, Diversity and Inclusivity initiatives (EDI) and our institutional goal to build a diverse community of exceptional undergraduate and graduate students from all parts of the world.

Tuition offset revenue continues to support students with financial barriers to access. As enrolment grows, and as tuition increases, this revenue has grown over the last five years and there has been a 143.2 per cent increase in spending on need-based supports since 2019/20.

Since 2019/20, there has been a 143.2 per cent increase in spending on need-based supports.

FIGURE 7: UNIVERSITY OPERATING SPENDING ON NEED-BASED SUPPORTS



UNDERGRADUATE STUDENTS

Domestic Undergraduate Students

The university continues to prioritize domestic students and the changing demographic of students. In 2022/23, \$3.16M in hybrid financial supports was issued to 1,087 domestic students. Hybrid funding provides funding to students with indicated financial need and students from equity-denied groups. This includes the addition of tuition offset revenue to support access of domestic students. Award programs such as the Discover University of Alberta Award and Turtle Spirit Pathway Award for First Nations, Métis, and Inuit Students, both designed to provide funding to undergraduate students with demonstrated financial challenges and barriers, are also in place to increase accessibility.

Bursaries saw a 17.1 per cent increase (\$1.45M). This is the third year in a row that there was a six-figure increase in bursary funding (\$2,005,397 in 2021/22 and \$947,906 in 2020/21). There was increased spending on bursaries because of the increase in allocation to need-based programs from the tuition offset revenue.

TABLE 4: ALLOCATION OF FUNDS TO DOMESTIC UNDERGRADUATE STUDENTS

Funding Source	Number of Students				Total Amount			
	2020/21	2021/22	2022/23	Trend	2020/21	2021/22	2022/23	Trend
Scholarship	7,469	8,861	8,529	↓	\$20,228,933	\$22,489,276	\$21,495,934	↓
Bursary	739	886	977	↑	\$6,488,525	\$8,493,922	\$9,944,224	↑
Hybrid ⁵			1,087				\$3,160,399	
Repayable Emergency Loan	93	202	284	↑	\$148,730	\$420,982	\$592,683	↑
RO Administered Total	8,301	9,949	10,877	↑	\$26,866,189	\$31,404,180	35,193,239	↑

Source: Office of the Registrar

Indigenous Undergraduate Financial Support

Funding issued to First Nations, Métis and Inuit (FNMI) students is included in domestic totals. FNMI students continue to be a target demographic for financial support.

According to the 2022/23 Annual Report on Undergraduate Enrolment, the university has 1,600 self-declared Indigenous undergraduate students. Of these 1,600 students, 71 per cent (1,129 students) are currently receiving financial support (not including third-party/First Nations, Métis or Inuit sponsorship). This is a 6 per cent (66 more students) increase compared to the prior year.

In 2022/23, overall spending on Indigenous students from RO administered funding sources increased by 24 per cent (\$981,353), which is largely attributed to an increase in hybrid award spending. 407 Indigenous students received \$1.3M in hybrid awards, accounting for 37 per cent of the total hybrid students who received hybrid funding in 2022/23. Hybrid awards are intended to provide students with indicated financial need funding earlier in the year and to proactively address the financial shortfall and therefore need to access bursary funding.

⁵ Hybrid awards issued to international students are awards with criteria for equity-denied groups, which includes visible minorities.

Total tuition offset spent on Indigenous students was \$1,665,600, which is 31 per cent of total domestic undergraduate tuition offset spending. More Indigenous students received some type of financial support than in previous years, and for a second year the proportion of funding to Indigenous students outpaced enrolment growth.

Indigenous enrolment increased by 15 per cent while the number of Indigenous students receiving financial supports only increased by 48 per cent. This is the result of more dedicated funding for Indigenous students.

TABLE 5: ALLOCATION OF FUNDS TO INDIGENOUS UNDERGRADUATE STUDENTS

Funding Source	Number of Students				Total Amount			
	2020/21	2021/22	2022/23	Trend	2020/21	2021/22	2022/23	Trend
Scholarship	551	553	586	↑	\$2,160,673	\$2,209,594	\$1,972,966	↑
Bursary	85	223	164	↓	\$807,775	\$1,771,256	\$1,625,244	↓
Hybrid			407	↑			\$1,302,440	↑
Repayable Emergency Loan	34	64	84	↑	\$52,033	\$126,201	\$187,754	↑
RO Administered Total	670	840	1,241	↑	\$3,020,481	\$4,107,051	\$5,088,404	↑

Source: Office of the Registrar

Note: Government merit-based funding is captured here as part of scholarships.

Note: Total recipients includes double counting.

International Undergraduate Students

For international students, our approach has been an impactful combination of planned and flexible funding. Ukrainian students suffering financial hardship due to the war were provided with funding support, including waiving 2022/23 tuition fees for Ukrainian Study Permit holders.⁶ The university provided 77 students with Ukrainian citizenship with \$844,650 in financial support in 2022/23. Funding for Ukrainian students was provided through the *Advanced Education Supports for Displaced Post-secondary Ukrainian Students in Alberta* grant agreement.

The university has increased its competitiveness with a new recruitment scholarship strategy which includes the President's International Distinction Scholarship, a large and renewable scholarship that provides \$120,000 over four years to qualified students. We have also made adjustments to streamline bursary application and administration for all international students for the 2022/23 academic year through the creation of an International Supplementary Bursary Application which allowed for improved student application process.

⁶ We also provide supports in the form of emergency funding through the David Turpin and Suromitra Sanatani Award for Refugees and Displaced Persons. The award is given to three to four students annually who are refugees from various regions around the world. We work with World University Service Canada and partner with them on the Student Refugee Program.

In 2022/23, 1,731 or 32 per cent of international students (4 per cent of total undergraduate enrolment) received financial supports. Students from 73 countries received financial supports. Overall spending on international undergraduate students in 2022/23 increased by \$2,494,321 (27 per cent).

This is the third year a seven figure increase in spending occurred with a 20 per cent increase in 2021/22 (\$1.5M) and a 23 per cent increase in 2020/21 (\$1.45M).

Receiving a scholarship from the University of Alberta has been a great honour and a source of motivation for me. It has enabled me to pursue my academic goals without worrying about the financial burden. It has also given me the opportunity to participate in various extracurricular activities and to network with other talented and diverse students. Coming from a country that is facing economic hardship, the scholarship has been a lifeline for me and my family. It has allowed me to access quality education and to improve my prospects for a better future.

Jesugbenga, Faculty of Science | Nigeria

TABLE 6: ALLOCATION OF FUNDS TO INTERNATIONAL UNDERGRADUATE STUDENTS

Funding Source	Number of Students				Total Amount			
	2020/21	2021/22	2022/23	Trend	2020/21	2021/22	2022/23	Trend
Scholarship	1,483	1,650	1,500	↓	\$6,087,377	\$7,622,060	\$9,850,082	↑
Bursary	130	95	109	↑	\$1,550,405	\$1,557,124	\$1,762,838	↑
Hybrid			21				\$37,390	
Repayable Emergency Loan	13	14	24	↑	\$17,450	\$25,425	\$48,620	↑
Total	1,626	1,759	1,654	↑	\$7,655,232	\$9,204,609	\$11,698,930	↑

Source: Office of the Registrar

Note: Figure represents funding from University Operating, Donor Endowed, Donor Annual, and Repayable Emergency Loans administered by both the RO and UAI. Total recipients includes double counting.

GRADUATE STUDENTS

Administration of graduate student financial supports is shared between FGSR and the RO. FGSR administers merit-based supports while the RO focuses on need-based supports for graduate students. Between FGSR and the RO, \$54,786,934 was issued as financial support to graduate students in 2022/23.

The majority of graduate student funding is merit-based. FGSR issued \$31M in merit-based funding in 2022/23. 2,359 students received merit-based scholarships, accounting for 28 per cent of the total graduate student enrolment. \$23.6M in RO administered graduate financial support, including government loans, was issued to 1,359 graduate students in 2022/23. This accounts for 16 per cent of the total graduate student body. Overall 44 per cent of graduate students received a form of financial support.

3.9M in RO administered graduate financial support was issued to graduate students in 2022/23. This is a 37 per cent (\$1.08M) increase in RO administered graduate financial support compared to last year.

The number of graduate students accessing bursaries increased by 7 per cent (18 students) with bursary spending increasing by 23 per cent (\$641,933). These are similar proportions compared to 2021/22. Domestic graduate students account for 58 per cent of the graduate study body⁷ and received \$1,310,314 in need-based financial supports. This accounts for 36 per cent of total graduate need-based supports. International graduate students currently account for 42 per cent⁸ of graduate enrolment and received \$2,309,008 (64 per cent of total) in need-based financial supports.

Domestic Graduate Students

Domestic students account for 58 per cent of the graduate student body and received \$44.8M in financial supports. \$23M was in the form of merit-based scholarships (76 per cent of merit-based supports) and \$21M was in the form of need-based supports (90 per cent of need-based supports). The high proportion of need-based supports being allocated to domestic graduate students is due to government loan disbursements being included in these calculations.

FGSR endeavours to attract and retain top-tier domestic graduate students through Tri-Council top up awards: The Walter H John's Fellowship for master level winners and the President's Doctoral Prize of Distinction for successful doctoral Tri-Council Scholarship applicants. Due to rising cost of living and tuition costs, in 2022/23 the value of the awards was increased from \$5,000 to \$7,100. Providing these scholarships at the increased value will help position the University of Alberta as a top destination for these award winners to pursue their studies.

Indigenous Graduate Students

Indigenous graduate students account for 3.1 per cent of the graduate student population and received \$4,075,755 in both need- and merit-based support in 2022/23. 220 Indigenous students (84 per cent) received \$2,957,530 in merit-based funding (9 per cent of merit-based funding) and 90 students received \$1,118,225 in need-based funding (4.7 per cent of need-based funding). Overall, 244 Indigenous graduate students received funding support, either need-based, merit-based or combination of the two, which is 93 per cent of self-identified Indigenous graduate students at the U of A.

⁷ Graduate Student Enrolment Report 2022/23

⁸ Graduate Student Enrolment Report 2022/23

Receiving a scholarship at the University of Alberta came at a crucial moment for me and my studies, as it allowed me to continue my academic journey. With financial worries eased, I could focus on my studies and personal development, leading to a more fulfilling educational experience. The scholarship not only recognized my past achievements but also invested in my potential and commitment as a student. Being selected for this scholarship was certainly a boost in my confidence as an Indigenous woman, empowering me to achieve my aspirations and shape a brighter future.

Cindy, Educational Policy Studies | Calgary

International Graduate Students

International graduate students account for 42 per cent of the graduate student population and received \$9,896,571 in need- and merit-based funding in 2022/23. 979 (28 per cent) international students were issued \$7,587,566 in merit-based support (24 per cent of merit-based funding). 220 international students were issued \$2,309,005 in need-based funding (9.7 per cent of need-based funding).

TABLE 7: ALLOCATION OF FGSR AND RO ADMINISTERED FUNDS TO GRADUATE STUDENTS BY TYPE OF SUPPORT

Funding Source	Number of Students				Total Amount			
	2020/21	2021/22	2022/23	Trend	2020/21	2021/22	2022/23	Trend
Scholarship	68	72	2,359	n/a	\$282,563	\$208,141	\$31,145,785	n/a ⁹
Bursary	246	266	284	↑	\$2,227,068	\$2,742,499	\$3,384,432	↑
Hybrid			108				\$333,150	
Repayable Emergency Loan	116	67	90	↑	\$231,617	\$132,609	\$234,887	↑
Total	430	405	2,841	↑	\$2,741,248	\$3,083,249	\$35,098,255	↑

Source: Faculty of Graduate Studies and Research and Office of the Registrar

⁹ This is the first time FGSR administered scholarships are reported; as such, trend information is not available.

WHAT'S NEXT

STRATEGIC ENROLMENT INITIATIVES

The RO and FGSR have been working to develop new programs and processes that support the strategic enrolment initiatives of the university, Equity, Diversity and Inclusion (EDI) and Indigenous initiatives (II) as well as address some of the affordability challenges of students.

Equity, Diversity, and Inclusion and Indigenous Initiatives

Access Awards

In 2021/22, the RO developed new access award programs to support 50 incoming students facing financial barriers.

The awards addressed a pre-existing program gap to support entrance students with renewable funding.

The awards have two streams: one for domestic students and another exclusively for FNMI students to ensure dedicated support to FNMI students.

Funding for these awards comes from domestic tuition offset revenue, included in this report.

Hybrid Funding

The university continues to increase funding for hybrid supports, intended to proactively offset costs for students in need or students in equity-denied groups.

Additional tuition offset revenue has been allocated for continuing students to support EDI goals.

We will continue to evaluate hybrid funding that targets students with indicated financial need.

Graduate Community Engagement Scholarship

This scholarship is for Black graduate students on campus.

The award is valued at 10K per student.

48 Graduate Community Engagement Scholarship awards were disbursed in 2022/23.

FGSR Award for Part-Time Indigenous Students

This award supports Indigenous graduate students on campus who are registered part-time.

The award is valued at 6K per student.

Most merit-based awards are open to full-time students only, so this award is an important initiative in supporting all FNMI graduate students.

EDI Student Survey

On the most recent continuing undergraduate scholarship application, some demographic information was collected to understand how the diversity and representation of equity-deserving and equity-denied groups compared between scholarship applicants and the general student body. Through the undergraduate scholarship application process, SFS collects aggregate personal information on a range of factors known to be positive indicators of student financial need (see table below). As all continuing undergraduate scholarship applicants provide this information, SFS holds a complete and accurate picture of the extent to which students with identified financial need present these stress factors. The prevalence of the same financial need indicators in the wider student population can be estimated on the basis of the EDI Student Survey, administered to all U of A students in (Fall 2021). Participation in the survey was based on self-selection rather than random sample, but the high rate of response (45%) lends weight to the EDI survey outcomes.

This is the second year this scholarship applicant information has been collected. With the implementation of a new scholarship application system, there was an 38.7% increase in the overall application numbers. The improved student experience of submitting a scholarship application lends to these increases, and to the increases in the number of applicants that identified as having indicated financial need or from equity-denied groups. While there is positive growth in the data collected, there remains opportunities to increase the representation of students from these groups in the scholarship applicant pool.

SFS will continue to collect scholarship applicant information as it gives us an opportunity to track trends in student demographics for all financial support applications. With increased focus on funding intended to support EDI goals, capturing trends is necessary to see how the profile of financial support applicants (and recipients) shifts over time.

TABLE 8: EDI STUDENT SURVEY RESULTS

Demographic	EDI Student Survey Result	2021/22 Scholarship Applicant Results	2022/23 Scholarship Applicant Results
Students with dependents	8.5%	2.5%	4.8%
First generation students	34.4%	15%	16.1%
Identify as FNMI	4.9%	3.5%	6.7%
Identify as gender non-conforming	4.2%	1%	3.5%
Working for 15 hours or more	21.2%	17%	36.2%

Affordability Initiatives

Advisory Group on Moderate Standard of Living and Bursary Applications

The Advisory Working Group on Moderate Standard of Living and Bursary Applications provides a collaborative engagement between students and administration on a series of critical issues related to the provision of need-based funding at the University of Alberta.

The advisory working group will gather input and review processes to ensure the university has a sustainable, progressive and responsive bursary program.

Guaranteed Minimum PhD Funding

FGSR continues its work on a proposal for guaranteed minimum funding of \$25,000 per annum for four years for PhD students.

The most recent round of consultations began in December 2022, after the Interim Vice-Provost, Dr. Verna Yiu, challenged the university community to make minimum guaranteed funding for PhD students a matter of priority. Earlier versions of the proposal were also shared with a small cross-university reference group including Vice-Deans, Chair and Associate Deans (Graduate).

Graduate Student Travel for Research Collaborations or Conference Participation

This funding supports these important activities for all graduate students.

Recognizing that the cost of travel is increasing, the maximum award value will be increased from \$1,500 in 2022/23 to \$2,000 in 2023/24.

Service Excellence Initiatives

Bursary End to End Review

The RO is working to complete a robust review of domestic bursary programs to improve the student experience including assessment timelines and barriers presented by the application process.

Other post-secondary institutions have been consulted and information has been gathered from a number of on-campus stakeholders, including students. As a result, recommendations for short-term and long-term changes are being drafted.

Graduate-Related Initiatives

FGSR is continuing to enhance workshops for graduate students who are compiling graduate scholarship applications. This includes collaboration with the Academic Success Centre and the SagePod Coordinator to provide workshops related to graduate student scholarship application skills throughout the year.

FGSR is undertaking a Form Digitization project which will enhance workflows for graduate stakeholders and create processing efficiencies.

Blackbaud Award Management

The RO continues to implement the new Blackbaud Award Management System, a streamlined scholarship management program for higher education.

The initial phase focused on continuing awards and we will begin rolling out the platform to new incoming students for the Fall 2024 recruitment cycle.

Financial Literacy

The RO continues to evaluate opportunities to increase financial literacy initiatives including partnerships with the campus community and student groups.

For more information, contact:

Office of the Registrar
780.492.3113
ualberta.ca/registrar

Graduate Award Services,
Faculty of Graduate Studies and Research
780.492.9460
grad.awards@ualberta.ca
uab.ca/gradawards



Overview

Student Financial Support Overview 2022/23

The University of Alberta is committed to the provision of robust student financial support programs to benefit Albertan, out-of-province, Indigenous, and international undergraduate and graduate students.

Date:
SEPTEMBER 2023

The University of Alberta, its buildings, labs and research stations are primarily located on the traditional territory of Cree, Blackfoot, Métis, Nakota Sioux, Iroquois, Dene and Ojibway/ Saulteaux/ Anishinaabe nations; lands that are now known as part of Treaties 6, 7 and 8 and homeland of the Métis. The University of Alberta respects the sovereignty, lands, histories, languages, knowledge systems and cultures of First Nations, Métis and Inuit nations.



OUR FUNDING, OUR STUDENTS

The Student Financial Support Overview provides a snapshot of student funding for the 2022/23 fiscal year. A supplement to the full Annual Report on Student Financial Support, this provides a high-level view of our financial support programs and the students who access them.



The scholarship enabled me to focus on my studies and maintain a 4.0 GPA. I was also able to spend more time interviewing for jobs and work as a government policy analyst this summer since I did not feel the pressure to settle for unqualified positions outside my field of interest. All of this would not have been possible without the financial support I was given.

Bohdana, Augustana Campus / Ukraine

TOTAL REGISTRAR'S OFFICE (RO) SUPPORTED UNDERGRADUATE FINANCIAL SUPPORT SPENDING, 2022/23

FUNDING SOURCE	NEED-BASED	MERIT-BASED	HYBRID-BASED ¹	TOTAL AMOUNT
DONOR	\$3,011,624	\$9,350,132	\$858,399	\$13,220,155
GOVERNMENT	\$171,205,628	\$8,069,500		\$179,275,128
UNIVERSITY OPERATING	\$3,836,912	\$5,744,613	\$539,690	\$10,121,215
UNIVERSITY TUITION OFFSETS	\$5,361,828	\$8,181,770	\$1,362,000	\$14,905,599
UNIVERSITY EXCEPTIONAL TUITION INCREASE	\$138,000	\$0	\$437,700	\$575,700
EXTERNAL FUNDING				\$1,177,441
TOTAL	\$183,553,993	\$31,346,015	\$3,197,789	\$219,275,238

¹Hybrid-based financial supports are intended to proactively offset students' costs and fill a gap in merit-based funding to ensure accessibility for all students. They include a combination of academic and/or other achievements and are based on financial need. This is the first year hybrid supports are included in the Student Financial Support Report.

UNDERGRADUATE FINANCIAL SUPPORTS – RO ADMINISTERED

\$46.9M
RO ADMINISTERED FUNDING

28.2% = \$13.2M
DONOR

17.2% = \$8.07M
GOVERNMENT MERIT

21.6% = \$10.1M
UNIVERSITY OPERATING FUNDS

33.0% = \$15.5M
UNIVERSITY TUITION OFFSETS²

²Tuition offsets include revenue from both domestic and international tuition. 100 per cent of revenue collected through the university tuition offset was spent.

TOTAL FACULTY OF GRADUATE STUDIES AND RESEARCH (FGSR) AND RO SUPPORTED **GRADUATE FINANCIAL SUPPORT SPENDING, 2022/23**

FUNDING SOURCE	NEED-BASED	MERIT-BASED	HYBRID-BASED	TOTAL AMOUNT
DONOR	\$579,932	\$5,230,891	\$131,500	\$5,942,323
GOVERNMENT	\$19,688,679	\$10,659,103		\$30,347,781
TRI-COUNCIL		\$9,060,132		\$9,060,132
UNIVERSITY OPERATING	\$840,587	\$6,195,659	\$8,250	\$7,044,497
UNIVERSITY TUITION OFFSETS	\$2,198,800	\$0	\$12,000	\$2,210,800
UNIVERSITY EXCEPTIONAL TUITION INCREASE			\$181,400	\$181,400
EXTERNAL				\$117,220
TOTAL	\$23,307,999	\$31,145,785	\$333,150	\$54,904,154

\$35.1M

FGSR/RO ADMINISTERED FUNDING

16.9% = \$5.9M
DONOR

30.4% = \$10.7M
GOVERNMENT MERIT

25.8% = \$9.1M
TRI-COUNCIL

20.1% = \$7.0M
UNIVERSITY OPERATING FUNDS

6.3% = \$2.4M
UNIVERSITY TUITION OFFSETS

The scholarships I received were integral to supporting my graduate student experience, allowing me to focus on my work without being excessively stressed about finances. They were also helpful to my sense of purpose and achievement as external indicators of success and provided important lines on my CV as I look toward a future academic/creative career.

Liam, Faculty of Arts | Lethbridge

\$54.9M

TOTAL
DISTRIBUTED
GRADUATE
FUNDING



ABOUT OUR FINANCIAL SUPPORT RECIPIENTS

UNDERGRADUATE

GRADUATE



DOMESTIC

20,135 
TOTAL RECIPIENTS

66%
OF TOTAL DOMESTIC
UNDERGRADUATE ENROLMENT

\$206M
RECEIVED IN FUNDING

83%
OF DOMESTIC FUNDING
WENT TO ALBERTAN STUDENTS



INDIGENOUS

1,129 
TOTAL RECIPIENTS

71%
OF TOTAL INDIGENOUS
UNDERGRADUATE ENROLMENT

\$12M
RECEIVED IN FUNDING

24%
INCREASE IN RO ADMINISTERED
FUNDING TO FNMI STUDENTS



INTERNATIONAL

1,597 
TOTAL RECIPIENTS

32%
OF TOTAL INTERNATIONAL
UNDERGRADUATE ENROLMENT

\$11.7M
RECEIVED IN FUNDING

73
COUNTRIES REPRESENTED BY
STUDENTS RECEIVING FUNDING

2,739 
TOTAL RECIPIENTS

56%
OF TOTAL DOMESTIC
GRADUATE ENROLMENT

\$44.9M
RECEIVED IN FUNDING

76%
OF DOMESTIC GRADUATE
MERIT-BASED FUNDING WENT
TO ALBERTAN STUDENTS

244 
TOTAL RECIPIENTS

93%
OF TOTAL INDIGENOUS
GRADUATE ENROLMENT

\$4M
RECEIVED IN FUNDING

90%
OF FUNDS IN THE FORM
OF SCHOLARSHIPS

979 
TOTAL RECIPIENTS

28%
OF TOTAL INTERNATIONAL
GRADUATE ENROLMENT

\$9.9M
RECEIVED IN FUNDING

80
COUNTRIES REPRESENTED BY
STUDENTS RECEIVING FUNDING

For more information, contact:

Office of the Registrar
780.492.3113
ualberta.ca/registrar

Graduate Award Services,
Faculty of Graduate Studies and Research
780.492.9460
grad.awards@ualberta.ca
uab.ca/gradawards





ITEM NO. 11

Decision ☐ **Discussion** ☒ **Information** ☐

ITEM OBJECTIVE: To gain a more in depth understanding of the financial challenges impacting graduate students in 2023.

DATE	November 20 th , 2023
TO	General Faculties Council
RESPONSIBLE PORTFOLIO	Graduate Students' Association

EXECUTIVE SUMMARY:

Background

The Graduate Students' Association (GSA) has consistently heard concerns about how the cost of living impacts the academic pursuits of graduate students. This report will showcase the concerns expressed by students. This report highlighted that over 40% of respondents have contemplated leaving their programs due to financial pressures, a figure that is significantly 10% higher than the national average.

Analysis / Discussion

The GSA's research survey was active for three weeks, spanning from August 14 to August 30, 2023. To ensure maximum participation, we primarily distributed the online survey link through our weekly GSA newsletters and further amplified its reach with a special bulletin on August 20, 2023. We were pleased to receive 640 responses, offering a comprehensive and diverse representation of graduate students at the University of Alberta. This encompassed a wide range of demographics, reflecting various socioeconomic backgrounds, household compositions, residence statuses, and more.

Risk Discussion / Mitigation of the Risk

This report highlighted that over 40% of respondents have contemplated leaving their programs due to financial pressures, a figure that is significantly 10% higher than the national average.

Where applicable, list the legislation that is being relied upon

N/A

Next Steps

- Reporting the results to the wider university community and the general public.
- Using the data as a mechanism to support better funding solutions for the Graduate students.



ITEM NO. 11

Supporting Materials:

Understanding Financial Realities: An Analysis of the Financial Condition among UofA Graduate Students Report.

SCHEDULE A:

Engagement and Routing

Consultation and Stakeholder Participation / Approval Route (parties who have seen the proposal and in what capacity) <[Governance Resources Section Student Participation Protocol](#)>

Those who are actively *participating*:

- GSA President and Elected Officials (GSA Board)
- Entire Graduate Student population
- GSA Staff

Those who have been *consulted*:

- Entire Graduate Student population

Those who have been *informed*:

- Relevant University offices
- Standing Committees
- Graduate Students

Approval Route:

- **GSA board**

Supplementary Notes / Context:

N/A



Graduate Students' Association
University of Alberta

Understanding Financial Realities: An Analysis of the Financial Condition among UofA Graduate Students

August 30, 2023 Results

780-492-2175
www.ualberta.ca/graduate-students-association
1-49 Triffo Hall, University of Alberta, Edmonton, AB, T6G 2E1



Graduate Students' Association

University of Alberta

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Executive Summary

The "Understanding Financial Realities" report, initiated by the Graduate Students' Association (GSA), sheds light on the pressing concerns consistently raised about how the cost of living negatively impacts the academic pursuits of graduate students at the University of Alberta (UofA). Recent findings from our in-depth analysis, have provided us with eye-opening insights and deeper understanding of these challenges, painting a clearer picture of the financial realities our graduate students currently face.

It's particularly concerning that over 40% of respondents have contemplated leaving their programs due to financial pressures, a figure that is significantly 10% higher than the national average reported in the [2021 National Graduate Student Finance Survey](#) by the Ottawa Science Policy Network.

Our findings echo the narrative from the U of A Campus Food Bank, highlighting an increased reliance on food bank services. Disturbingly, over 30% of our survey participants rely on them. Additionally, a staggering 60% of respondents are grappling with housing costs that exceed the city's average. This financial strain has a pronounced effect on international students and PhD candidates, who not only struggle to afford life in the city but also face a heightened risk of discontinuing their studies.

The escalating expenses related to groceries, housing, and accumulated student debt urgently require our attention. They directly impede student achievements and starkly contrast with the affordability and transparency ideals upheld by both the GSA and the [Student Experience Action Plan \(SEAP\)](#).

At the GSA, we're deeply committed, alongside the University of Alberta, to promoting graduate student success. It's alarming to see students facing financial hardships to the extent that they rely on food banks, cut back on nutrition, limit housing expenses, or even consider abandoning their studies. This financial pressure isn't just an academic concern—it directly impacts mental and physical well-being. As emphasized by the [Financial Consumer Agency of Canada](#), financial stress doubles the likelihood of poor health, leading to increased sleep issues and other health concerns.

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1-49 Triffo Hall, University of Alberta, Edmonton, AB, T6G 2E1



A. Introduction

Graduate studies represent a pivotal phase in a student's academic journey, setting the course for their future. Yet, the path to advanced degrees can often be overshadowed by financial challenges, affecting both the well-being and academic accomplishments of graduate students. To delve deeper into these challenges and to understand how students manage their finances in today's landscape, the Graduate Students' Association (GSA) at the University of Alberta conducted the "Understanding Financial Realities" survey.

B. Methodology

The GSA's "Understanding Financial Realities" survey was active for three weeks, spanning from August 14 to August 30, 2023. To ensure maximum participation, we primarily distributed the online survey link through our weekly GSA newsletters and further amplified its reach with a special bulletin on August 20, 2023.

We were pleased to receive 640 responses, offering a comprehensive and diverse representation of graduate students at the University of Alberta. This encompassed a wide range of demographics, reflecting various socioeconomic backgrounds, household compositions, residence statuses, and more.

To incentivize participation, respondents had the option to enter a raffle for one of three food retailer coupons by sharing their email addresses. Aside from this, the survey remained entirely anonymous.

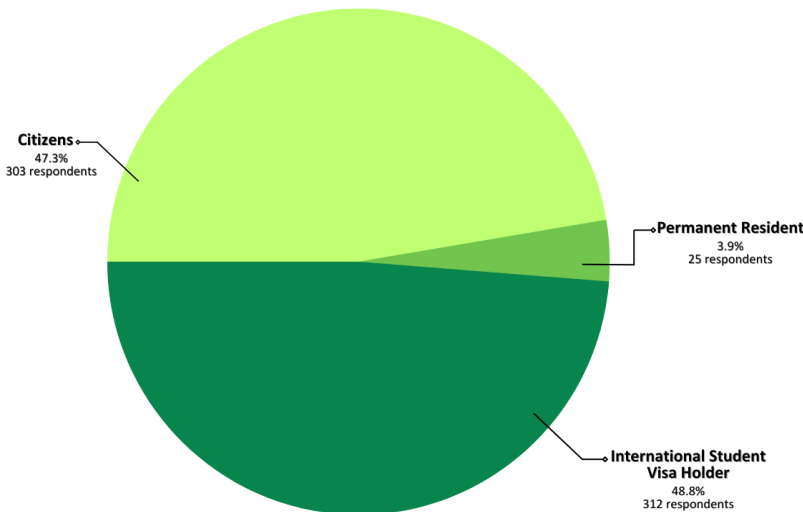
780-492-2175
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1-49 Triffo Hall, University of Alberta, Edmonton, AB, T6G 2E1



C. Demographic Profile

Status

640 Respondents



Among the survey participants, it can be observed that 312 individuals held International Student Visas, closely followed by 303 Canadian citizens. Additionally, 25 respondents identified themselves as permanent residents.

Figure 1: Demographic Profile of Respondents based on Residency Status

Degree

640 Respondents



307 out of the 635 were currently completing their Doctoral degree, 133 were taking a Course-based Masters and 199 were completing a Thesis-based Masters.

Figure 2: Demographic Profile of Respondents based on Current Program/Degree



Household Size

640 Respondents

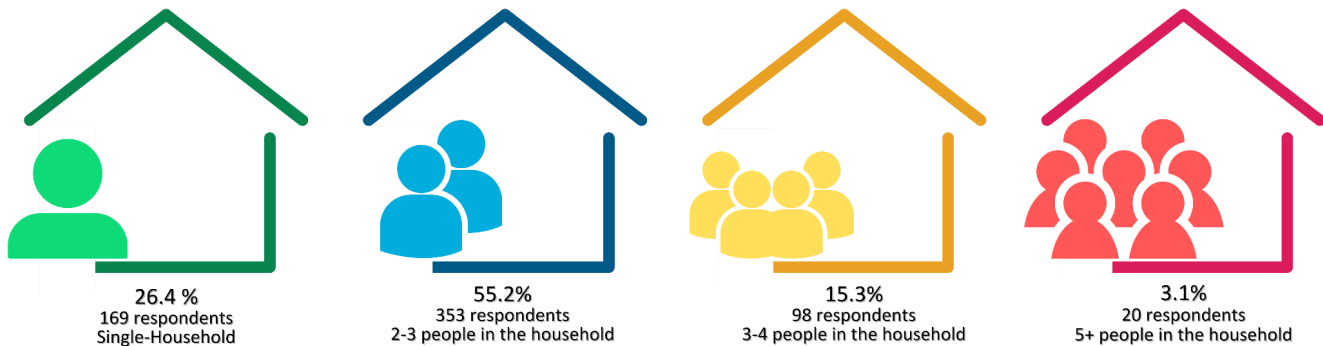


Figure 3: Demographic Profile of Respondents based on Household Size

In relation to household composition, 353 respondents reported living with 1 to 2 individuals in their households. Among them, 169 resided in single-person households, 98 in households with 3 to 4 occupants, and 20 in households consisting of 5 or more individuals.

Dependents at Home

640 Respondents

Based on previous knowledge that a significant number of graduate students are parents, we were intrigued by the relatively low number of respondents indicating they had dependents. The data revealed that the majority of respondents, comprising 81.3% (n=520), reported having no dependents, while only 18.7% (n=120) of survey participants disclosed having one or more dependents. This finding underscores an interesting aspect of the respondent demographics.

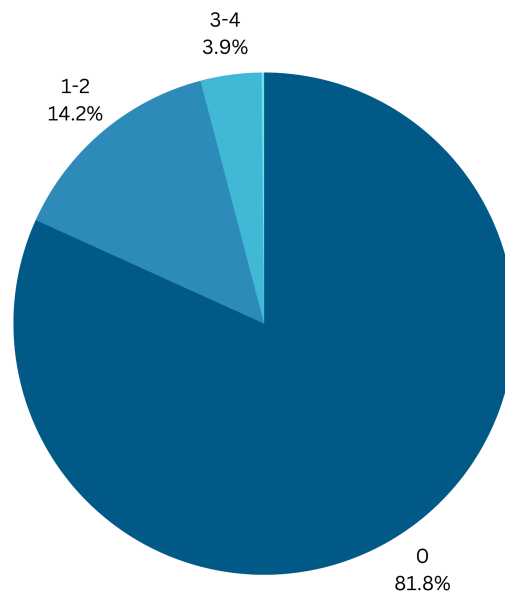


Figure 4: Demographic Profile of Respondents based on No. of Dependents

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1-49 Triffo Hall, University of Alberta, Edmonton, AB, T6G 2E1

Average Household Income (Annual)

640 Respondents

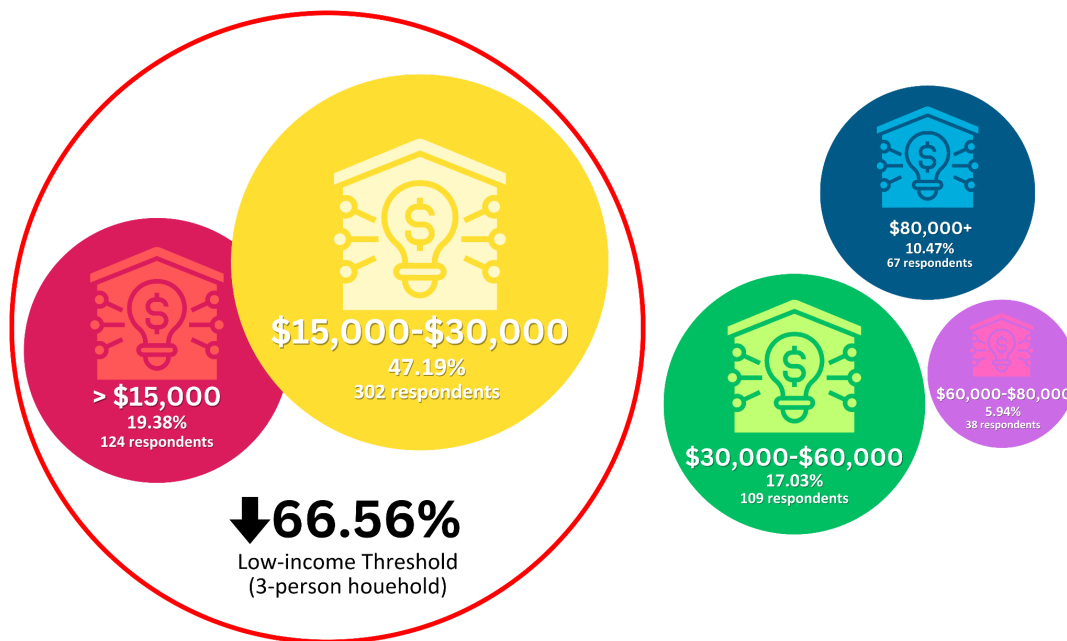


Figure 5: Demographic Profile of Respondents based on Annual Average Household Income

A total of 426 individuals, making up 66.56% of respondents, reported having an Annual Average Household Income (AAHI) below \$30,000. According to [Statistics Canada](#), this income level is below the low-income threshold for a household consisting of two individuals, set at \$27,000. Additionally, 109 respondents indicated an AAHI ranging between \$30,000 and \$60,000, while 38 respondents disclosed an AAHI falling within the \$60,000-\$80,000 range, and 67 respondents reported an AAHI exceeding \$80,000.



D. Lifestyle and Financial Background

The survey results also provided insight into the lifestyle and financial background of the respondents. By examining these, we are able to gain a better understanding of their choices and priorities in managing their finances.

Housing Cost (Monthly)

640 Respondents

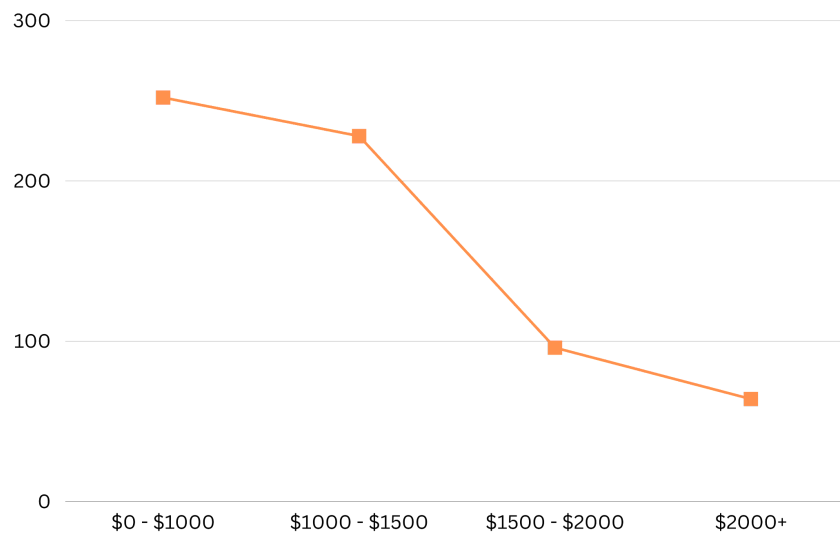


Figure 6: Distribution of Respondents based on their Monthly Housing Cost

When asked about monthly housing costs, it was revealed that 252 respondents spent less than \$1,000, 228 spent \$1,000-\$1,500, 96 spent \$1,500-\$2,000, and 64 spent over \$2,000, highlighting significant variations in housing expenditures among the surveyed population.

According to a 2023 survey report by [Canada Mortgage and Housing Corporation](#) (CMHC), the average rent for a 2-bedroom apartment in Edmonton has increased by 1.6% from 2021, with the recent rate standing at approximately \$1,304. The data underscores a significant housing affordability issue that is possibly confronting students not just in Edmonton, but across Canada as well.



Utility Cost (Monthly)

640 Respondents

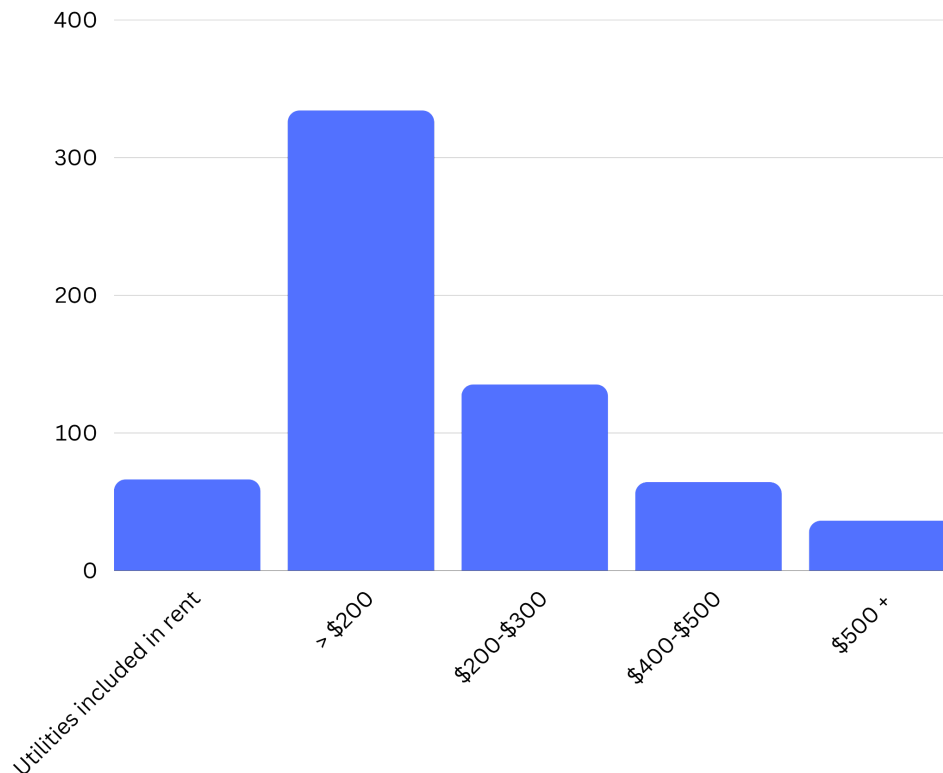


Figure 7: Distribution of Respondents based on Monthly Utility Cost Average

The bar chart illustrates monthly utility cost (excluding rent) among respondents. The majority of respondents (334 respondents) spend less than \$200 a month, followed by 136 in the \$200-\$300 range. Notably, 67 have utilities included in rent, while fewer respondents spend over \$400. The chart provides a snapshot of utility spending patterns in our survey.



Average Cost for Groceries (Monthly)

640 Respondents

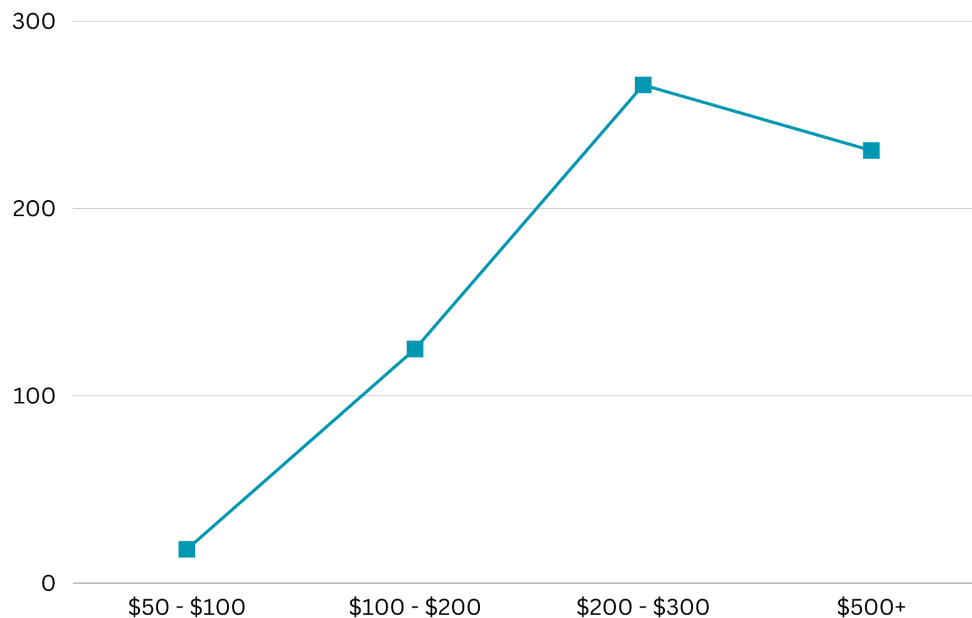


Figure 8: Distribution of Respondents based on Monthly Groceries Cost Average

266 respondents spent \$200-\$300 on monthly groceries, 231 spent more than \$500, 125 spent \$100-200, while 18 respondents said they only spent \$50-\$100.

Data from [Statistics Canada](https://www150.statcan.gc.ca/n1/pub/52-626-x/2023001/article/00001-eng.htm) show that despite having the prices of groceries go down by 0.4% in August 2023 (vs July 2023), prices remain elevated.

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Average Transportation Cost

Optional - 525 Respondents

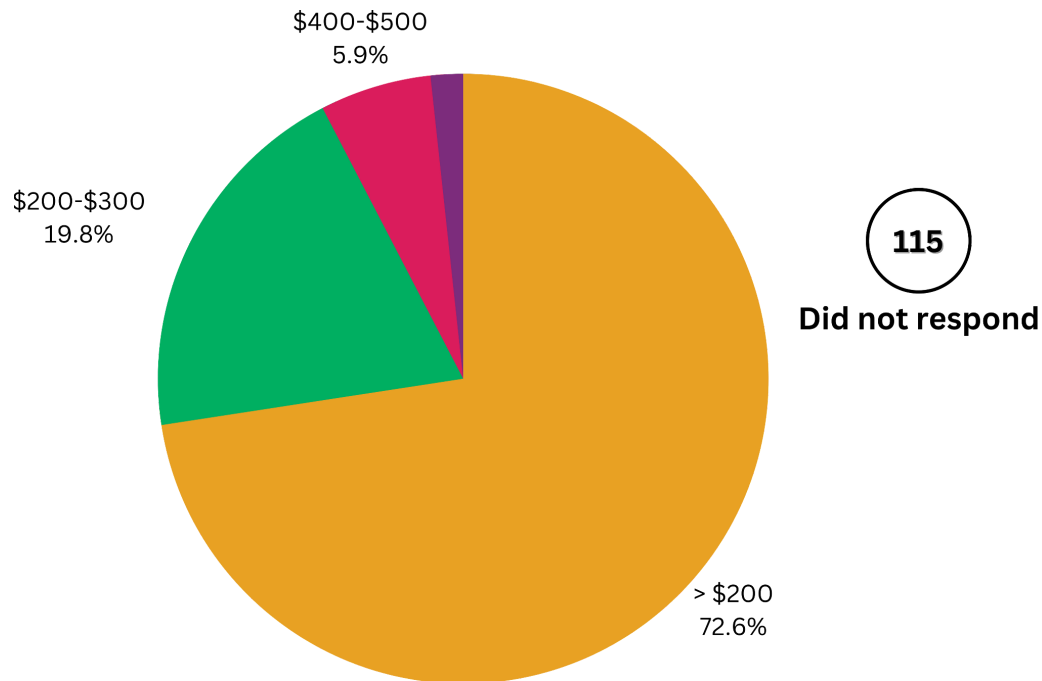


Figure 9: Distribution of Respondents based on Average Transportation Cost

Regarding average monthly transportation expenses, the survey revealed that 381 respondents spend under \$200, 104 allocate \$200-\$300, 31 fall within \$400-\$500, and 9 exceed \$500. It's noteworthy that 93 didn't respond.



Average Personal or Household Debt

Optional - 473 Respondents

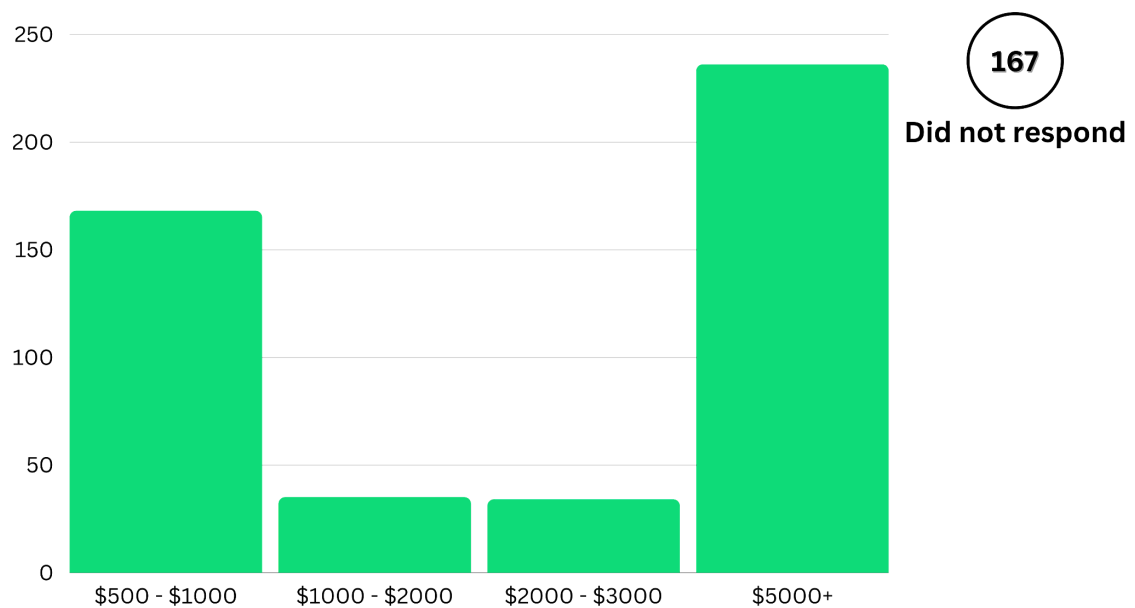


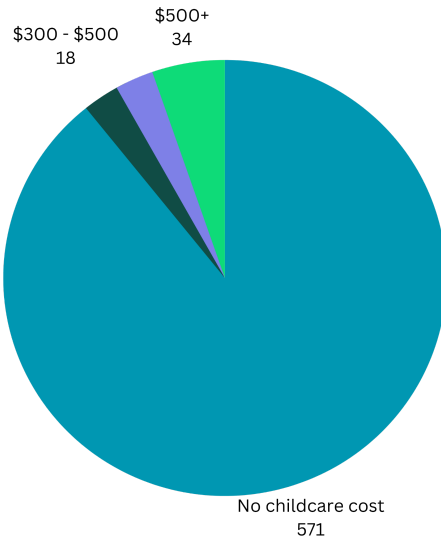
Figure 10: Distribution of Respondents based on Personal/Household Debt

Out of the surveyed participants who did answer, 236 reported an average personal/household debt exceeding \$5,000. Another 168 indicated debts between \$500 - \$1,000, while 35 and 34 respondents fell within the \$2,000-\$3,000 and \$1,000-\$2,000 ranges, respectively.



Average Childcare Cost

640 Respondents

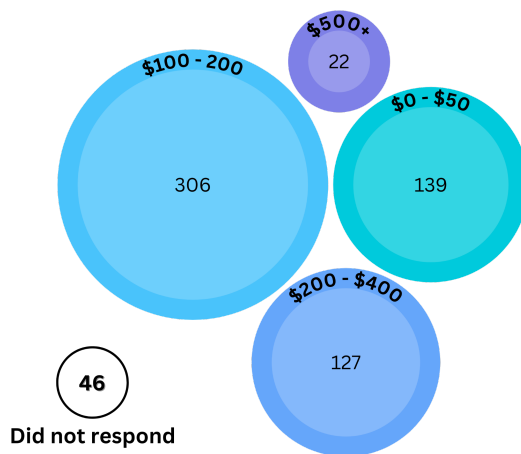


As previously mentioned, the GSA recognizes that a significant number of graduate students are parents. 10.9% (n=69) reported spending over \$200 on childcare, while a vast majority, 89.1% (n=566), indicated they had no childcare expenses.

Figure 11: Distribution of Respondents based on Average Childcare Cost

Cost for Leisure and Lifestyle

Optional- 594 Respondents



In response to the question on approximate leisure and lifestyle expenditures (e.g., restaurants, movies, online subscriptions, recreation), the data revealed: 139 spend \$0-\$50; 306 allocate \$100-\$200; 127 earmark \$200-\$400; 22 spend over \$500; and 46 offered no response.

Figure 12: Distribution of Respondents based on Average Leisure and Lifestyle Cost



Financial Support

640 Respondents

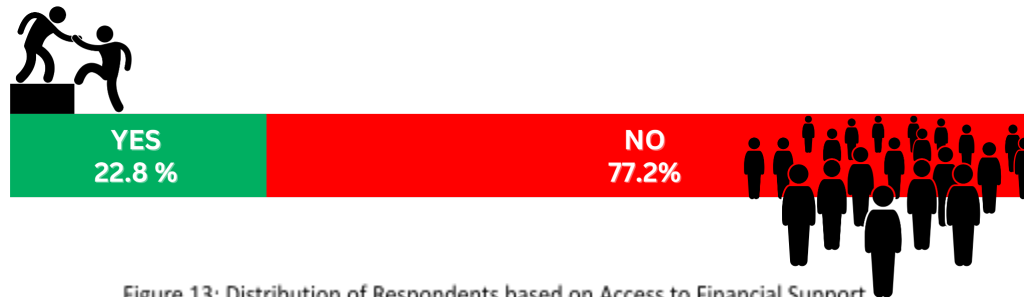


Figure 13: Distribution of Respondents based on Access to Financial Support

Out of the respondents, 494 stated they did not receive financial support from friends or family, while 146 confirmed they did.

Food Bank Usage

640 Respondents



Figure 14: Distribution of Respondents based on Usage of Food Banks

Of the 640 respondents surveyed about their use of food banks, 216 confirmed they are seeking food bank services, while 424 had not. Of the affirmative responses, 200 identified the specific food banks they've accessed.

The majority, with **over 190 respondents**, relied on the **U of A Campus Food Bank**. A smaller group, fewer than 10, sought assistance from alternative sources such as the Edmonton Food Bank, religious-affiliated food banks, or food banks at other universities. The remaining 16 did not specifically identify where they get their food bank services from.

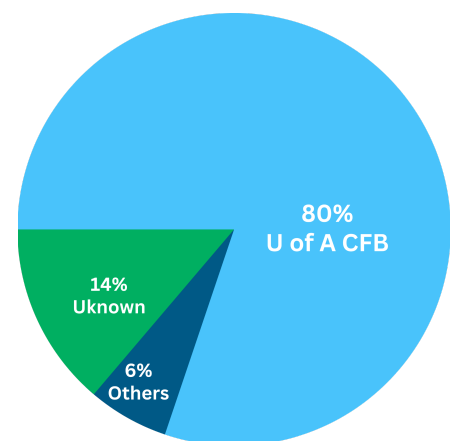


Figure 15: Breakdown of Food Bank Services Accessed by Students

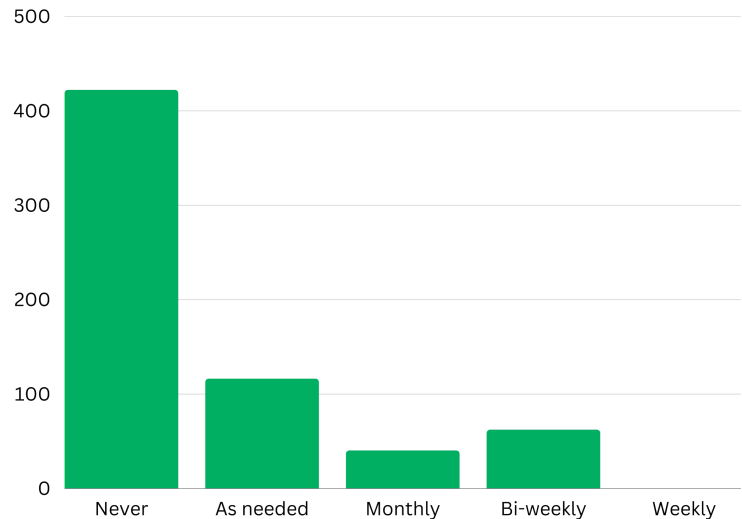
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Frequency of Food Bank Access

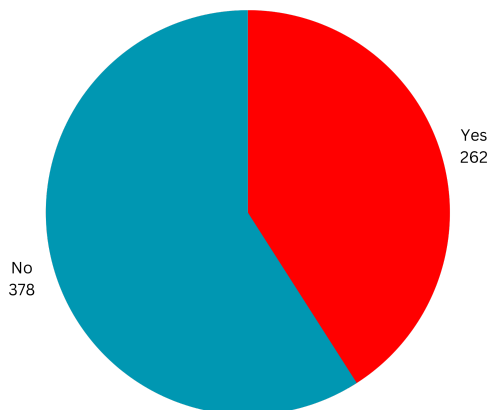
640 Respondents

Out of the respondents, 422 reported that they have never used food bank services. However, among the 216 respondents who provided details on their frequency of food bank usage, 116 access it only when necessary, 40 utilize the service monthly, and 62 visit bi-weekly.



Consideration of Dropping Due to Financial Reasons

640 Respondents



A staggering 40.9% of respondents have revealed that they have thought about dropping out of their programs to work or save money due to the cost of living.

Figure 17: Distribution of Respondents based on Tendency to Drop Out



E. Analyzing Variable Interrelationship

The chi-square test of independence (also known as the chi-square test for association) is a statistical test used to examine if two categorical variables in a contingency table have a significant connection.

If the calculated value is less than or equal to the critical value, or if the p-value is less than the chosen alpha level ($p = 0.05$), there is enough evidence to conclude that there is an association between the two categorical variables. But if the value is greater than the alpha level, there's not enough evidence to suggest an association based on the data and the chosen significance level.

Specific to this report, we will be combining the following: Citizens and permanent residents – to be referred to as “domestic students”; PhD VS Masters (Course-based and Thesis-based).

Only variables that have significant association are included in this section.



Status x Debt Level

RESIDENCY STATUS	DEBT LEVEL					Row Total
	Did not answer	\$500-\$1000	\$1000-\$2000	\$2000-\$3000	\$5000+	
Domestic Students	64 (38.3%)	54 (32.1%)	9 (25.7%)	15 (44.1%)	186 (78.8%)	328
International Students	103 (61.7%)	114 (67.9%)	26 (74.3%)	19 (55.9%)	50 (21.2%)	312
Column Total	167	168	35	34	236	640

Figure 18: Contingency Table (Residency Status x Personal/Household Debt)

Our analysis of the student debt based on students' residency status showed that Domestic Students are approximately 6.86x more likely to incur debts over \$5000 than International Students. Furthermore, the odds of having debt in general are 2x higher for Domestic Students compared to International Students.

Domestic and international graduate students' financial experiences in Canada can vary greatly, notably in terms of tuition prices, financial assistance sources, and subsequent student debt.

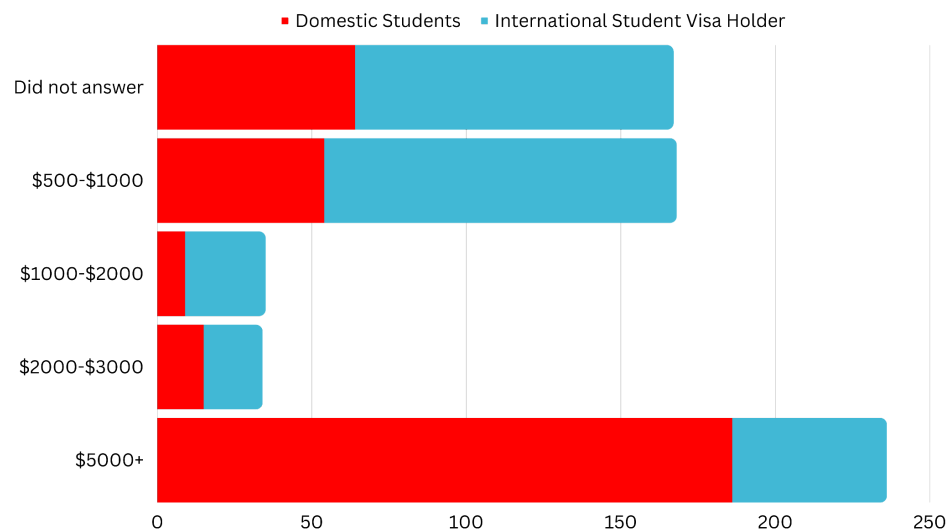


Figure 19: Comparative Stacked Bar Graph of Debt Levels by Residency Status



While the survey showed that domestic students might be more inclined to assume higher debt, there are several reasons that could explain these discrepancies.

- International students coming to Canada have to prove they have sufficient funds to cover tuition and living costs to get their visas. However, this doesn't mean they won't face money problems later. With the rising cost of living, limited work opportunities due to their status, or struggle with high international student fees, international students can often find themselves in a tight financial spot.
- International students often arrive in Canada without a local credit history, which is crucial for securing loans. This lack of credit history typically disqualifies them from accessing most provincial and federal government loans, which are commonly available to domestic students. Consequently, international students may seek loans from private providers, although such options are often limited and might carry less favorable terms.

A study from the [Canadian Science Publishing](#) corroborates these assertions, indicating that international students and members of historically underrepresented communities face heightened financial challenges compared to their domestic counterparts.

One reason domestic students might accumulate higher debt could be their familiarity with various education funding options. These students typically have easier access to and understanding of the process for securing government student loans as compared to international students.



Status x Food Bank Usage

RESIDENCY STATUS	FOOD BANK USAGE		Row Total
	YES	NO	
Domestic Students	44 (20.4%)	284 (70%)	328
International Student	172 (79.6%)	140 (30%)	312
Column Total	216	424	640 (100%)

Figure 20: Contingency Table (Residency Status x Food Bank Usage)

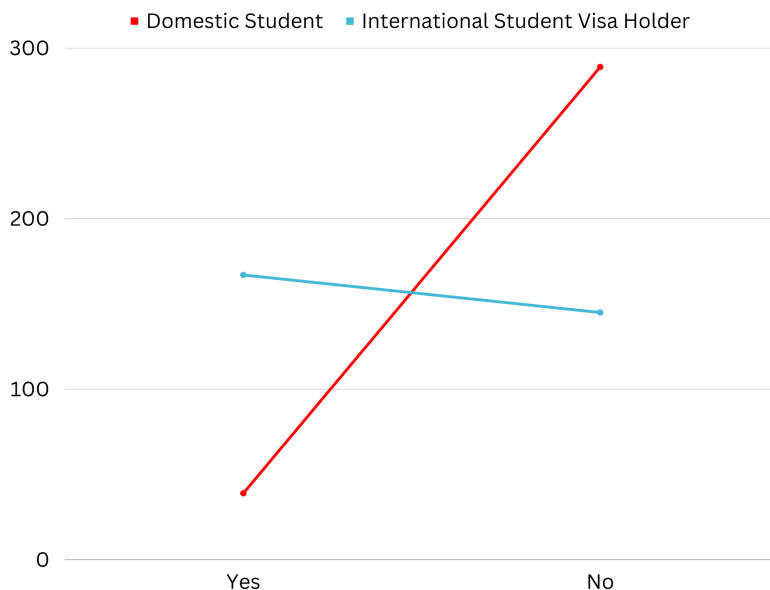


Figure 21: Depicting Trends in Food Bank Usage by Residency Status

Based on the calculations, the odds of international students using food banks are approximately 8x higher than that of domestic students. This significant difference suggests a strong association between student residency status and reliance on food banks.

A study conducted by the [University of Alberta's Campus Food Bank](#) found that 7 out of 10 users are international

students, and most of them are studying for graduate degrees. One reason could be that many international students don't have family nearby to help them when money is tight.

Moreover, consistent reports from [New Canadian Media](#) s, reflecting observations across various Canadian universities, underscore the prevalence of food insecurity predominantly among international students. This evidence highlights the persistence of significant financial challenges experienced by international students.



Status x Housing Cost

RESIDENCY STATUS	MONTHLY HOUSING COST				Row Total
	\$0 - \$1000	\$1000 - \$1500	\$1500 - \$2000	\$2000+	
Domestic Students	96 (38.1%)	112 (49.1%)	68 (70.8%)	52(81.3%)	328
International Student	156 (61.9%)	116 (50.9%)	28 (29.2%)	12(18.8%)	312
Column Total	252	228	96	64	640 (100%)

Figure 22: Contingency Table (Residency Status x Housing Cost)

Based on the calculations, international students are more likely to fall into the lower housing cost categories than domestic students to incur higher housing costs.

Results show that International Student Visa Holders are more likely to look for cheaper housing as compared to domestic students. Some reasons we see why this happens is because given the higher tuition fees for international students and potential exchange rate issues, they might budget more conservatively for housing.

In addition, a [study on housing challenges faced by postgraduates](#) in universities in Toronto showed that international students are more likely to live in shared accommodations or experience predatory practices from landlords just to cut costs for housing.



Housing Cost x Tendency to Drop Out

MONTHLY HOUSING COST	TENDENCY TO DROP OUT		Row Total
	YES	NO	
\$0 - \$1000	93 (35.5%)	159(42.06%)	252
\$1000 - \$1500	88 (33.59%)	140 (37.04%)	228
\$1500 - \$2000	46(17.56%)	50(13.23%)	96
\$2000+	35(13.36%)	29(7.67%)	64
TOTAL	262	378	640

Figure 23: Contingency Table (Housing Cost x Tendency to Drop Out)

The results suggest a positive association between the amount spent on housing and the likelihood of considering dropping out, with higher housing costs linked to a greater tendency to think about discontinuing studies. Students spending over \$2000 show the highest likelihood of contemplating dropping out.

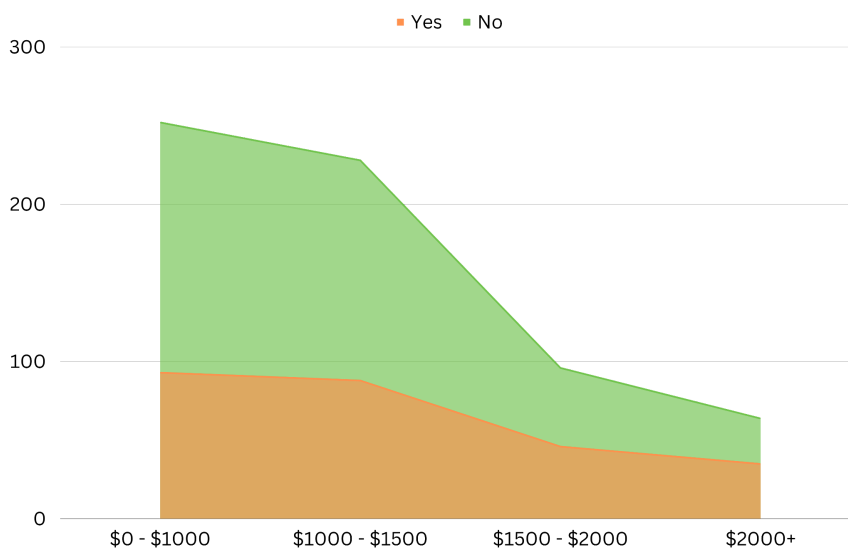


Figure 24: Stacked Area Chart on Dropout Tendencies Based on Average Monthly Housing Costs

With rising housing costs, respondents spending more than \$1,500 are more likely to consider dropping out of their programs. Given the prevailing [housing crisis impacting university students](#), a primary factor behind such considerations is the financial strain from the nationwide housing challenges. This stress might drive students to

prioritize full-time employment over continuing their studies.



Program x Tendency to Drop Out

Program	Tendency to Drop Out		Row Total
	Yes	No	
PhD	139 (53.1%)	168 (44.4%)	307
Masters	123 (46.9%)	210 (55.6%)	333
Column Total	262	378	640 (100%)

Figure 25: Contingency Table (Current Program x Tendency to Drop Out)

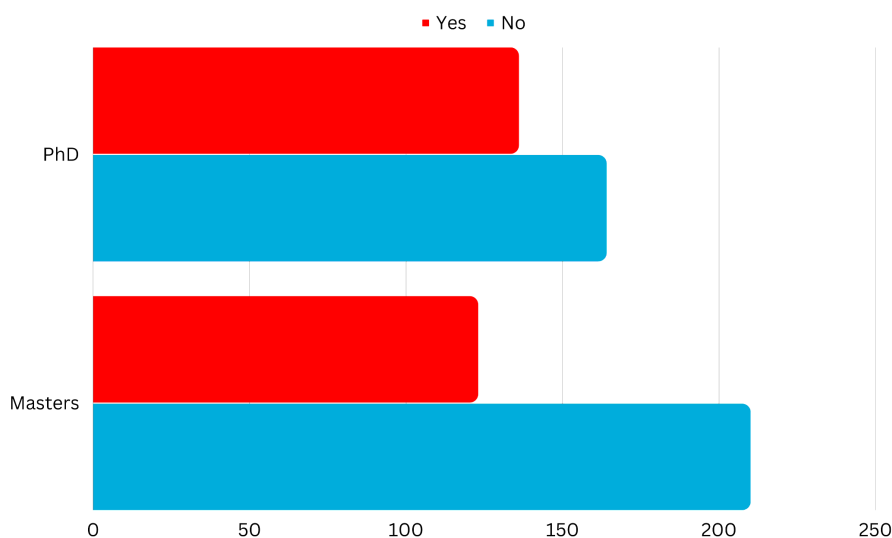


Figure 26: Row Chart on Dropout Tendencies by Current Graduate Program

The results suggest that PhD students are 1.41x more likely considering dropping out compared to Master's students. Factors contributing to this include the longer duration of PhD programs which means extended tuition and associated expenses. Additionally, the rigorous research demands, particularly during the dissertation stage, coupled with current financial strains from rising tuition

fees and inflation, further intensify the pressure. In situations with limited or depleted funding, students may also be more inclined to discontinue their studies.



F. Qualitative Responses

Responses collected from the survey are collectively summarized due to similarities in overall responses. Natural language processing machine learning (ML) model was used to analyse these free text responses.

Based on the survey, 90.7% of the respondents have had a range of effects on the respondents' cost of living, from modest adjustments to substantial challenges:

“In addition to my part time job, I've had to start doing side hustles such as tutoring, plasma donation, etc.”

Impact on Groceries and Dietary Habits: Respondents mentioned that the increased tuition costs have impacted their ability to afford groceries. Some are buying fewer groceries due to the rising costs, leading to changes in dietary habits such as reduced meat consumption, reliance on sales, resorting to donated food, and use of food banks.

Housing Challenges: The increased tuition costs have exacerbated existing burdens on students, especially those already facing increased rent and living expenses. Some have been compelled to search for cheaper accommodations due to the lack of a stipend increase.

Financial Assistance and Loans: Respondents are resorting to various financial strategies to cope with the increased costs. This includes borrowing from relatives, seeking bank loans, and applying for more student loans. Additionally, some are working additional jobs to meet their monthly expenditures.

Impact on International Students: International students are particularly affected due to their limited earnings and the higher burden of living costs. The increased tuition further compounds their financial challenges.

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Strict Budgeting and Lifestyle Changes: Respondents are experiencing difficulty in budgeting and managing expenses. Some mentioned that they are becoming more stringent in handling their income and savings in order to cope with rising prices.

“Skipped meals, restrictions on entertainment, general reduction in quality of life (consideration of self-harm)”

Health and Well-being: Affording essentials such as medical treatment and childcare has become difficult for some. There's a notable impact on mental health, with stress resulting from not being able to afford extracurricular activities and leisure.

Academic Impact: The financial strain has impacted academic pursuits and quality of life. The increased tuition costs are leading to difficult decisions for some respondents, such as the dilemma of choosing between finishing their degree sooner, taking on part-time work to delay graduation due to financial constraints, or dropping out of their programs.

Additional analysis was done on the students' comments to gain more insights based on educational qualifications, student status in Canada, degree types, and an emotional and psychological analysis using the Linguistic Inquiry and Word Count (LIWC) method.

Based on Degrees : The word cloud provides a visual representation of the frequency of words used by students enrolled in Ph.D., Masters - Course based, and Masters- Thesis based.

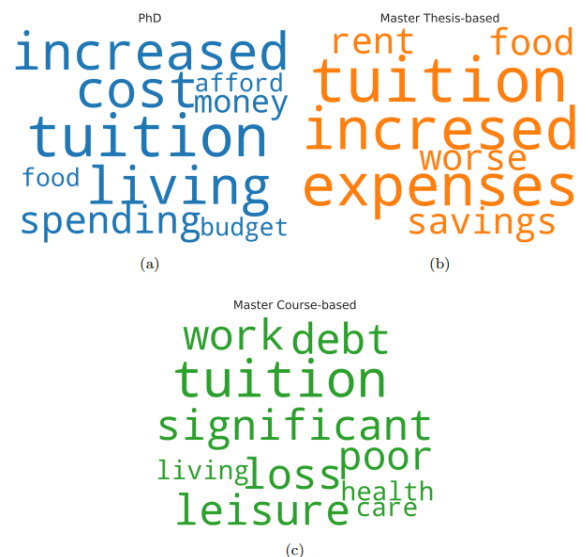


Figure 27: Word Cloud based on Current Degrees



Based on Citizenship Status: Next is the word cloud that represents the different topics highlighted by the resident students, whereas Figure 29 displays a word cloud that represents the different topics highlighted by the international students in Canada

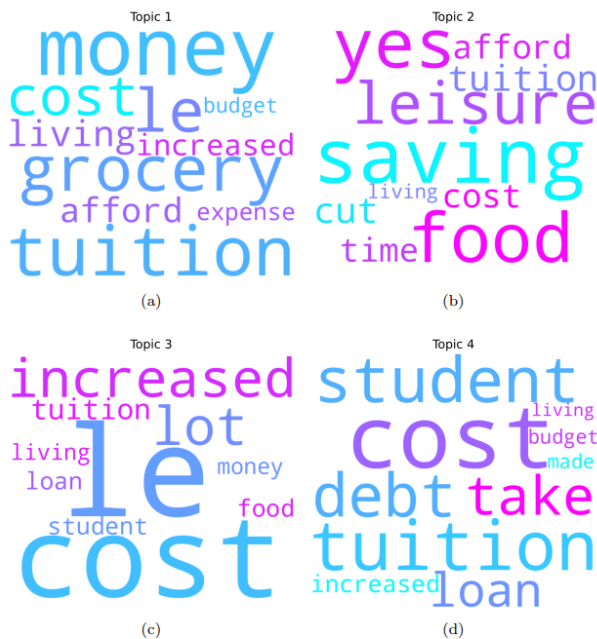


Figure 28: Word Cloud for Domestic Students in Canada

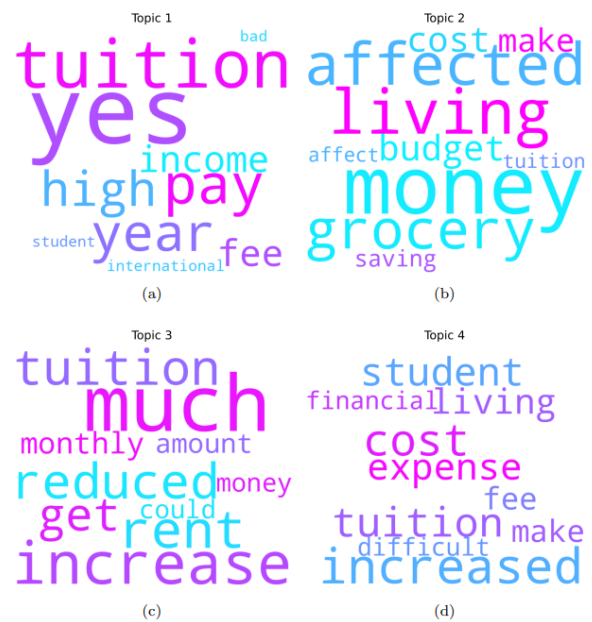


Figure 29: Word Cloud for International Students in Canada

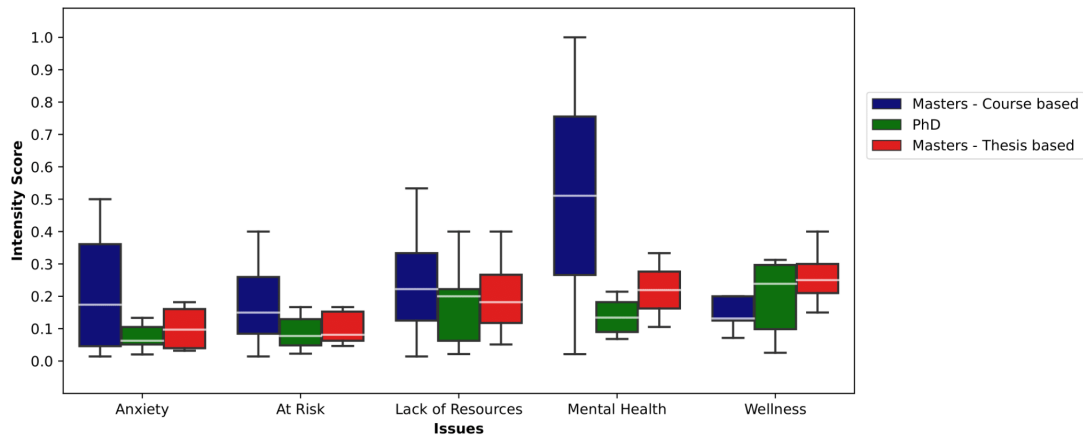


Figure 30: Emotional and Psychological Analysis

"I worked up until the day before I gave birth to try and make ends meet. It is a major source of stress for me and my family. It's not just tuition that has increased, but work doesn't pay more."

Emotional and Psychological Analysis: The LIWC analysis vividly highlights the profound impact of rising tuition costs on students. Not only does it strain their cost of living, but it also significantly influences their mental well-being, elevating levels of anxiety and impeding their ability to afford essential resources. This psychological impact appears to be more significant in the master's-course based cohort of students.

A small proportion of students (9.3%) reported a minimal impact of increased tuition fees on their overall cost of living, with some not perceiving any immediate effect or not noticing the increase. This group primarily consists of first-year students who might not be able to accurately assess the financial impact at this early stage of their studies.

Pressured But Manageable: Other respondents mention experiencing some pressure due to the increased tuition costs but still being able to manage their cost of living. This indicates a moderate impact on their finances. Some feel that the tuition increase was manageable for them this year.

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G. Summary

In summary, tuition fees and living costs are climbing, presenting significant challenges for the students in our survey. Most students are trying different financial strategies to handle these growing costs. Although a small group is managing okay, most are facing daily financial pressures, with students in Masters course-based programs feeling particularly anxious.

The inflation in Canada over the past year was 6.8%, and it's expected to rise by an additional 3.9% in 2023 ([IMF](#), 2023). This price increase is a main reason why students' average spending per month is going up, especially when you compare what they spend in 2023 to what they spent in 2022. The higher prices are impacting everything from the cost of groceries and housing to tuition fees, leading to an increase in students' monthly spending.

At the same time, the growing housing crisis is making students' financial situations even worse. Even though more international students are expected to come to Canada for their studies, there are no solid plans in place to help them find affordable housing. The GSA does not support limiting the number of international students and suggests finding different solutions that won't limit opportunities for these students in the future.

ITEM NO. 12

Decision ☐ **Discussion** ☒ **Information** ☐

ITEM OBJECTIVE: To share the draft, updated, Non-credit and Micro-credential Framework for information, feedback, and support.

DATE	November 20, 2023
TO	General Faculties Council
RESPONSIBLE PORTFOLIO	Provost and Vice-President (Academic)

Background

The Vice-Provost (Programs) and Associate Vice-President, Online Learning & Continuing Education launched a Non-credit Micro-credential Action Group in February 2023 – with the goal of updating and simplifying the University of Alberta’s (U of A) current *Non-credit/Micro-credential Framework* which was established in 2020. The updated *Framework* was co-created by the Micro-credential Action Group which includes representation from the U of A’s Colleges, Faculties, and Units currently delivering and supporting non-credit learning. The updated *Framework* is also supported by a development guide with clear steps and identified supports available for proponents.

Analysis / Discussion

The development and delivery of non-credit micro-credentials at the U of A gained momentum and attention with the Government of Alberta’s *Calls for Funding* to support non-credit micro-credential development in 2021, 2022. The *Calls for Funding* proposals developed by U of A team members showcased the widespread interest in developing micro-credentials at the U of A. The proposals also showed the vast difference in how U of A team members are interpreting a micro-credential, its purpose, its structure, and the cost to develop a high-quality offering.

An outcome of the Micro-credential Action Group was to update the existing framework to ensure it reflects recent current practice in Alberta and across the country, as well as the creation of a new development guide to support proponents on how to develop non-credit micro-credentials, specifying the steps required and support available to move from ideation to implementation.

The updated *Framework* provides information including best-practice recommendations for the design and development of micro-credentials and is complimented by a supportive development guide.

Risk Discussion / Mitigation of the Risk

The updated *Framework* includes the same number of non-credit programming categories as the original Framework, however, it simplifies the programming language. There will be a need to convert some current programming, most notably “Series” will be converted to “Certificates”. This will require the proponent to move through institutional governance and meet the principles in the *Framework*. This change primarily impacts the Continuing Education department.

ITEM NO. 12
Next Steps

Following approval of the Framework, the Continuing Education unit and the Office of the Provost will work on a case-by-case basis with the home Faculties of existing non-credit programming to ensure alignment with the updated *Framework* within one academic year from the date of approval of the updated *Framework*.

Supporting Materials:

1. U of A Non-credit/Micro-Credential Framework – 2020 - [link](#)
2. Updated – U of A Non-credit Programming Framework – [link](#)
3. Non-credit Micro-credential Development Guide - [link](#)

SCHEDULE A:
Engagement and Routing

Consultation and Stakeholder Participation / Approval Route (parties who have seen the proposal and in what capacity) <[Governance Resources Section Student Participation Protocol](#)>

Those who are actively participating:

The MC Guide was co-created by the Micro-credential Action Group - which resulted in a one-university approach to defining, developing, implementing, and promoting non-credit micro-credentials at the U of A. The Micro-credential Action Group includes representation by U of A Faculties and Units. Their contributions, time, and commitment are greatly appreciated and acknowledged.

Co-leads - Janice Causgrove Dunn (Office of the Provost and Vice-President (Academic)) and Jessica Butts Scott (Online Learning & Continuing Education)

Action Group - Allen Ball (Faculty of Arts, Online Learning & Continuing Education), Avery Letendre (Faculty of Native Studies), Bernadette Martin (Faculty of Rehabilitation Medicine), Emilie Champagne (Campus Saint-Jean), Anne McIntosh (Augustana Faculty), Kristin Mulligan (Online Learning & Continuing Education), Jane Lee (Office of the Registrar), Kate Peters (General Faculties Council), Michael Maier (Alberta School of Business), Heather Richholt (General Faculties Council), Sandra Lacza (Online Learning & Continuing Education), Tracy Raivio (Faculty of Science, College of Natural and Applied Sciences), Andrea Davila Cervantes (Faculty of Medicine & Dentistry), Carla Prado (Faculty of Agriculture, Life and Environmental Sciences), Frances Plane (Faculty of Medicine & Dentistry), Scott Key (Faculty of Education), Norma Rodenburg (Office of the Registrar), Brian Pardell (Online Learning & Continuing Education), Jason Carey (Campus Saint-Jean), Nathalie Kermoal (Faculty of Native Studies), Ivan Fair (Faculty of Engineering), Michelle Berg (Alberta School of Business), and Shawn Drefs (Faculty of Rehabilitation Medicine)

Those who have been consulted:

- Chairs' Council (April 18, 2023)
- GFC Programs Committee (PC) (June 22, 2023)

ITEM NO. 12

- Deans' Council (August 21, 2023)
- GFC Programs Committee (PC) (October 12, 2023)
- Provost's Council (October 16, 2023)
- *GFC Academic Planning Committee (APC) (November 1, 2023)*
- *General Faculties Council (GFC) (November 20, 2023)*
- *Program Support Team (PST) (November 23, 2023)*

Approval Route:**Supplementary Notes / Context:**

ITEM NO. 13Decision ☐ Discussion **X** Information ☐**ITEM OBJECTIVE:** Discuss the Learning Management System of the Future initiative

DATE	November 20 th , 2023
TO	General Faculties Council
RESPONSIBLE PORTFOLIO	Provost and Vice President (Academic)

EXECUTIVE SUMMARY:

The University of Alberta (U of A) is the last English-language university in the U15 to upgrade its Learning Management System (LMS). The previous LMS upgrade at the U of A happened 14 years ago, and the current system, Moodle (eClass), no longer meets the growing strategic teaching and learning needs of the University. Common challenges/feedback (front-facing) with the U of A's LMS include:

- Intuitiveness - navigation
- Modern tools to foster learner engagement
- Limited student mobile experience
- Limited access to data and analytics
- Robust feedback for assessments
- Lack of common templates / ease of use
- Limited built-in accessibility features
- Manual upgrades

The introduction of the [LMS of the Future initiative](#) will positively impact all courses and programs offered by U of A, fostering greater engagement between students and instructors while significantly improving the student experience.

In line with the U of A's new strategic plan, [Shape: A Strategic Plan of Impact](#), specifically the Education with Purpose section, a modern LMS will support four of the five areas the University aims to focus on. These areas include: leveraging the technological and pedagogical expertise of the faculty, facilitating hybrid and online learning, and enabling the use of analytics to enhance the student experience. The LMS of the Future addresses common challenges by being:

- **Accessible:** with inclusive design that enables peoples of all abilities to fully engage in learning
- **Data-driven:** with robust analytics that help faculty support their student's success
- **Easy to use:** with intuitive, mobile-friendly technology that works across all devices
- **Engaging:** with tools and resources that enable modern, personalized learning experiences
- **Integrated:** with seamless interoperability between academic tools and systems
- **Supported by partners:** with continuous improvement, training, and partnership with the LMS provider.

Next Steps:

ITEM NO. 13

We are keen to engage with the community about this exciting and important initiative for the University, and have many upcoming engagement opportunities. In fact, the success of this initiative relies on the feedback from instructors and other members of our university communities. We are hosting a series of engagement sessions in October and November. All members of the university community will be invited to give feedback on the vendor demonstrations planned for the end of November/beginning of December. Once a vendor has been selected, instructors will also provide crucial input into the implementation of the new LMS. Details of all of these engagements are available on the [project website](#). As part of the implementation, courses—that have seen many hours of development by instructors—will be transitioned to the new LMS as part of the project. It is crucial that the development that went into building eClass courses be available in the new LMS.

Critical Project Milestones:

- June - Sept 2023 Project initiation Statutory Deans' Council conversations
- Dec 2023 Vendor demonstrations (open to everyone @ U of A)
- Jan - Feb 2024 Instructor needs analysis & system configuration
- Mar - April 2024 Beginning of training and onboarding instructional design support
- Fall 2024 Early adopters first classes ongoing training/onboarding
- Fall 2025 Majority of U of A classes are using the new LMS

Members of the University community are encouraged to reach out to Robert Brennan (rb11@ualberta.ca) should they have any concerns and feedback to share.

Supporting Materials:

[Slide Deck](#)

[LMS of the Future Initiative](#)

SCHEDULE A:
Engagement and Routing

Consultation and Stakeholder Participation / Approval Route (parties who have seen the proposal and in what capacity) <[Governance Resources Section Student Participation Protocol](#)>

Those who are actively participating:

- LMS Sponsorship Team (Ongoing since September 25, 2023)
- LMS Project Management Group (From June to August, 2023)
- LMS of the Future Advisory Committee (Ongoing since October 23, 2023)

Those who have been consulted:

- CLE (April 7, September 27, 2023)
- Faculty of Science - Chairs (October 3, 2023)
- Alberta School of Business LMS Engagement Session (November 3, 2023)
- Faculty of Medicine and Dentistry (October 12, 2023)
- Deputy Provost, Students and Enrolment (June 21, 2023)
- Chief Information Officer (April 12, 2023)
- eClass Support Team (July 15 - August 24, 2023)

ITEM NO. 13

- PAIR (September 15, 2023)
- Associate Vice President, Online & CE (Mar 27, 2023)
- Faculty of Science LMS Engagement Session (November 7, 2023)

Those who have been **informed**:

- Statutory Deans' Council (June 7, 2023)
- Chairs' Council (October 7, 2023)
- GFC Executive (Oct 2, 2023)
- Deans' Council (October 4, 2023)
- GFC (October 16 and November 2, 2023)
- Programs Support Team (October 26, 2023)
- University Engagement Session (October 31, 2023)
- Faculty Leadership Team Meetings:
 - Rehabilitation Medicine: Teaching and Learning Subcommittee (September 11, 2023)
 - Native Studies: Asso. Dean Undergraduate & Indigenous Continuing Education & ONLINE Project Manager (September 14, 2023)
 - KSR: Dean, Asso. Dean Undergraduate & Manager of International and Community Education (September 15, 2023)
 - FOMD: Faculty Learning Committee (September 26, 2023)
 - Alberta School of Business: Senior Leadership Team (September 27, 2023)
 - School of Public Health: Senior Leadership Team (October 2, 2023)
 - Education: Dean's Advisory Committee (October 3, 2023)
 - ALES: Leadership Team (October 12, 2023)
 - Pharmacy & Pharmaceutical Sciences: Executive Academic Council (October 16, 2023)
 - Engineering: Asso. Deans, Learning (October 17, 2023)
 - Augustana: Academic Council (October 11, 2023)
 - Law: Admin Team (October 25, 2023)
 - Science:- Teaching and Learning Initiative team (October 26, 2023)
 - Campus Saint-Jean: Leadership Team (October 30, 2023)
 - Nursing: Leadership Team (October 31, 2023)
 - Arts - ACLE committee (November 2, 2023)
- Vice-Provost, EDI (November 6, 2023)
- Vice-Provost and Chief Librarian (September 12, 2023)
- Vice-President Facilities & Operations (October 23, 2023)
- Vice-President, Shared Services & Finance (October 18, 2023)
- Vice-President, Research and Innovation (October 20, 2023)
- Vice-President, External Relations (November 2, 2023)
- General Council & University Secretary (October 17, 2023)

Learning Management System of the Future

Office of the Provost and Vice-President (Academic)
2-40 South Academic Building (SAB), Edmonton AB Canada T6G 2G7



LMS of the Future - Why Renew

Why Renew the U of A's LMS?

- The LMS touches every student at the U of A
- Goals for the LMS of the Future benefiting faculty and students:
 - **Accessible:** with inclusive design that enables peoples of all abilities to fully engage in learning
 - **Data-driven:** with robust analytics that help faculty support their student's success
 - **Easy to use:** with intuitive, mobile-friendly technology that works across all devices
 - **Engaging:** with tools and resources that enable modern, personalized learning experiences
 - **Integrated:** with seamless interoperability between academic tools and systems
 - **Supported by Partners:** with continuous improvement, training, and partnership with the LMS provider

LMS of the Future - U of A Context

U of A Context:

- Almost every U of A course, on-campus and online uses the U of A's LMS
- The U of A's LMS is Moodle - an open-source platform
- It has been 14 years since the U of A renewed its LMS
- Common challenges/feedback (front-facing) with the U of A's LMS:
 - Intuitiveness - navigation
 - Modern tools to foster learner engagement
 - Limited student mobile experience
 - Limited access to data and analytics
 - Robust feedback for assessments
 - Lack of common templates / ease of use
 - Limited built-in accessibility features
 - Manual upgrades

LMS of the Future - Canadian Ecosystem

Canadian Ecosystem - U15 Comparators:

- **University of Alberta - Moodle**
- University of British Columbia - Canvas by Instructure
- University of Calgary - Brightspace by D2L
- Dalhousie University - Brightspace by D2L
- Université Laval - Moodle
- University of Manitoba - Brightspace by D2L
- McGill - Brightspace by D2L
- McMaster University - Brightspace by D2L
- Université de Montréal - Moodle
- University of Ottawa - Brightspace by D2L
- Queen's University - Brightspace by D2L
- University of Saskatchewan - Canvas by Instructure
- University of Toronto - Canvas by Instructure
- University of Waterloo - Brightspace by D2L
- Western University - Brightspace by D2L

U15 Comparator Statistics

- 60% of U15's use Brightspace by D2L
- 20% of U15's use Canvas by Instructure
- 20% of U15's use Moodle

- U of A is *the only* English language U15 using Moodle
- U of A is *the last* English language U15 to renew its LMS

LMS of the Future - Project Steering Committee

Project Sponsors:

- Shari Baraniuk, AVP and CIO (Information Services & Technology - Finance & Administration)
- Karsten Mündel, Vice Provost (Learning Initiatives - Office of the Provost)
- Jessica Butts Scott, AVP, Online Learning & Continuing Education (Office of the Provost)

Project Management:

- Robert Brennan, Senior Project Manager (Office of the Provost)
- Chris Brunelle, Executive Director (Enrolment Systems & Service Innovation - Office of the Provost)

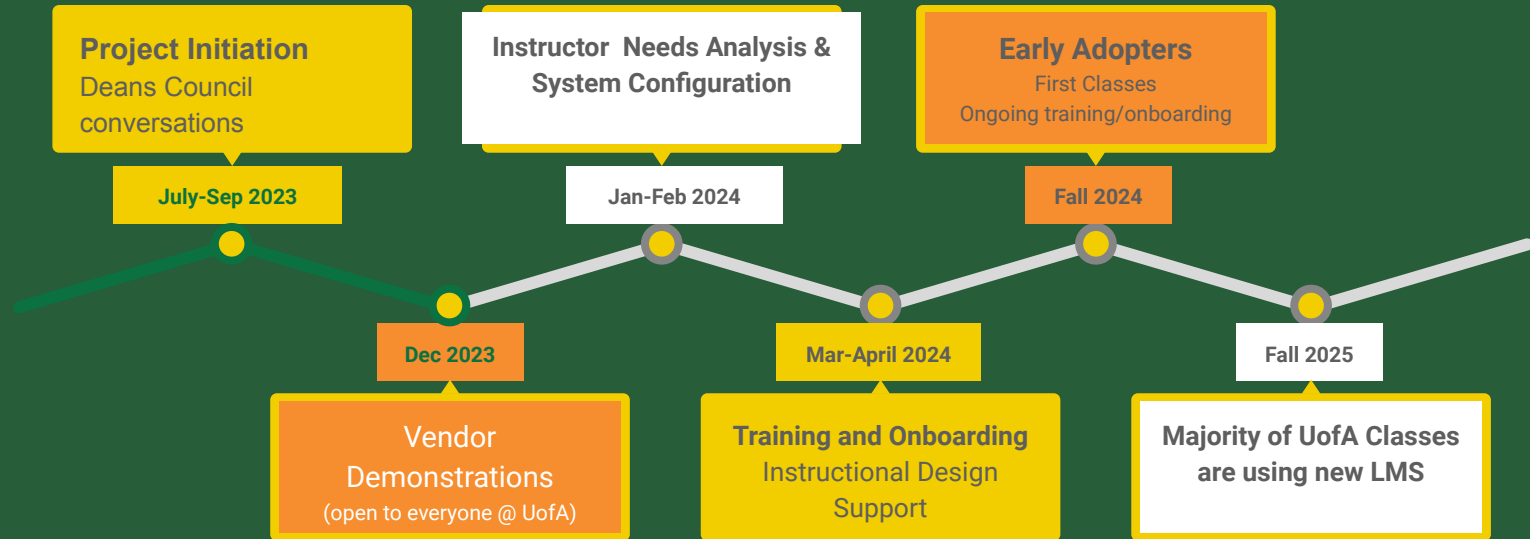
College Dean:

- Marvin Washington, Vice Provost and College Dean, College of Social Sciences and Humanities [155](#)

LMS of the Future - Advisory Committee

- Ali Shiri - Vice Dean (Faculty of Graduate Studies)
- Angela Bayduza - Associate Dean (Faculty of Kinesiology, Sport, and Recreation)
- Anita Parker - Lead Educational Developer (Centre for Teaching and Learning)
- Anne McIntosh - Associate Dean, Teaching (Augustana Campus)
- Avery Letendre - Indigenous Continuing Education & Online Project Manager (Faculty of Native Studies)
- Colleen Starchuk - Learning Consultant/Co-Director, Tech in Education (Faculty of Education)
- Deanna Singhal - Associate Dean, Teaching and Learning (Faculty of Science)
- Erik Berglund - E-Learning Professional Development Specialist (Faculty of Nursing)
- Erin Wright - Professor (School of Public Health)
- Heather Braid - Manager, Teaching and Learning (Alberta School of Business)
- Hollis Lai - Associate Professor (Faculty of Medicine and Dentistry)
- Iain Muir - Associate Teaching Professor (Faculty of Rehabilitation Medicine)
- Jeff Rawlings - Director, Digital Learning Environment (Information Services & Technology)
- Ken Cor - Clinical Professor (Faculty of Pharmacy & Pharmaceutical Sciences)
- Kim Frail - Head, Teaching and Learning (Library and Museums)
- Kristin Mulligan - Director, Online Learning (Online Learning & Continuing Education)
- Lise Niyuhire - Senior Coordinator, Innovation (Campus Saint-Jean)
- Lyndsey Barton - Senior Partner, Communications (VER Strategic Communications)
- Pedro Almeida - Vice-President Academic (University of Alberta Students' Union)
- Rebecca Nagel - Associate Dean, Undergraduate (Faculty of Arts)
- Rija Kamran - Vice-President Academic (Graduate Students' Union)
- Stanislav Karapetrovic - Professor (Faculty of Engineering)
- Vincent Bouchard - Professor (Faculty of Science)
- Other key stakeholders as needed

Project Timeline



Leading with Purpose.



UNIVERSITY
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General Faculties Council Standing Committee Report

GFC Executive Committee

- Since last reporting to GFC, the GFC Executive Committee met on October 30, 2023.
- Items Approved With Delegated Authority
 - Terms of Reference for Arts Faculty Council
- Items Discussed
 - Campus Food Bank
 - Template for GFC Standing Committee Terms of Reference

Terms of reference and records of meetings for this committee can be found at:

https://www.ualberta.ca/governance/member-zone/gfc-standing-committees#GFC_EXEC

Submitted by:

W Flanagan, Chair

GFC Executive Committee

General Faculties Council Standing Committee Report**GFC Academic Planning Committee**

1. Since last reporting to GFC, the GFC Academic Planning Committee met on November 1, 2023
2. Items Discussed
 - Updated Non-Credit/Micro-Credential Framework and Non-Credit Micro-Credential Development Guide
 - Student Financial Support Annual Report To Our Community and Accompanying Overview
 - PhD Minimum Funding

Terms of reference and records of meetings for this committee can be found at:

https://www.ualberta.ca/governance/member-zone/gfc-standing-committees#GFC_APC

Submitted by:
Verna Yiu, Chair
GFC Academic Planning Committee



General Faculties Council Standing Committee Report

GFC Programs Committee (PC)

1. This report includes information about PC's October 12, 2023 meeting. The November 9, 2023 PC meeting will be reported in January, 2024.
2. Items Approved with Delegated Authority from GFC
 - Course, Minor Program, and Minor Regulation Changes
 - - Augustana and Education
 - Medicine and Dentistry
 - Kinesiology, Sport, and Recreation
 - Rehabilitation Medicine Medicine and Dentistry
 - Proposed New Course Designator, DA (Dental Assisting), and New Courses
 - Program and Regulation Calendar Language for the Certificate in Dental Assisting
 - Proposed New Bioprocessing & Biomanufacturing Option and Suspension of Biomedical Option for the BSc in Chemical Engineering
3. Items Recommended to GFC for Approval
 - Time in Program While on Leave, Faculty of Graduate Studies and Research
4. Items Discussed
 - Updated Draft Non-credit and Micro-credential Framework
 - Quality Assurance Templates and Orientation
 - GFC Programs Committee Terms of Reference

Terms of reference and records of meetings for this committee are available here:

https://www.ualberta.ca/governance/member-zone/gfc-standing-committees/index.html#GFC_PC

Submitted by:

Janice Causgrove Dunn, Chair
GFC Programs Committee

General Faculties Council Standing Committee Report**GFC COUNCIL ON STUDENT AFFAIRS**

1. The GFC Council on Student Affairs met on November 2 and endorsed the following proposal for GFC's consideration
 - Student Experience Action Plan

Terms of reference and records of meetings for this committee can be found at:

https://www.ualberta.ca/governance/member-zone/gfc-standing-committees#GFC_COSA

Submitted by:
Verna Yiu, Chair
GFC Council on Student Affairs

[Distributed Electronically]

GFC Nominating Committee Report to GFC

Upon receipt and consideration of a GFC Nominating Committee (NC) Report, a GFC member has the opportunity to submit an additional nomination. For more information, please see the [NC Procedures](#).

The current nomination period ends at 12:00 pm (noon) on November 2, 2023

If no additional nominations are received by the end of the current nomination period, the GFC Nominating Committee Report to GFC is considered approved and recommended candidates are declared elected.

Please refer to the following list of **Membership Recommendations** as determined by the NC at their meeting of October 25, 2023:

GFC Standing Committees				
Name	Faculty/Office	Membership Category	Term Start	Term End
Council on Student Affairs (COSA)				
Asma Asmat	Science	At-large Undergraduate Student Member	Immediately	April 30, 2024
Nominating Committee (NC)				
Ehsan Hashemi	Engineering	At-large GFC Academic Staff Member	Immediately	June 30, 2026
Department Chair Selection and Review Faculty Panelists				
Ehsan Hashemi	Engineering	At-Large Academic Staff (A1.1/A1.6)	Immediately	June 30, 2026

Judiciary Committees				
Name	Faculty/Office	Role	Term Start	Term End
University Appeal Board (UAB)/Student Misconduct Appeal Panel				
Asma Asmat	Science	Undergraduate Student Panelist	immediately	November 2, 2025
Oakley Jean-Louis	Saint-Jean	Undergraduate Student Panelist	immediately	November 2, 2025

Additional Information:

For terms of references and current membership lists for GFC and GFC standing committees, please visit University Governance [Member Zone](#). For judiciary governance details, please visit: [University-level Appeal Bodies](#).

Contact for GFC Nominations and Elections

Kate Peters, Secretary to General Faculties Council

Email: peters3@ualberta.ca

FOR THE GFC MEETING OF NOVEMBER 20, 2023

I am pleased to report on the following highlights of the Board of Governors' Open Session meeting held on October 13, 2023:

REPORT OF THE CHAIR

Board Chair Kate Chisholm welcomed Elder Dr Francis Whiskeyjack, who started the meeting in a good way by performing a cleansing smudge and teaching Board members about the spiritual significance of the four elements involved in Indigenous ceremony: earth; water; wind; and fire.

At the request of the Chair, Joanne Lemieux, Professor (Department of Biochemistry) provided a learning moment on her work as Scientific Director of the Canadian Biomedical Research Fund (CBRF) PRAIRIE Hub for Pandemic Preparedness.

REPORT OF THE PRESIDENT

In addition to his written report, President Flanagan provided verbal updates on the new academic year, including student orientation activities in early September, and record student and Indigenous student numbers; the successful launch of Shape: The University Strategic Plan 2023-2033; the inaugural visit of new Minister of Advanced Education Rajan Sawhney to the University of Alberta on September 28, 2023; and the recent groundbreaking event at Michener Park, a University of Alberta Properties Trust (UAPT) development project.

DISCUSSION ITEMS

The Board of Governors discussed a budget update from the Vice-President (University Services & Finance), including indications from the Government of Alberta regarding potential grant reductions or increases; continued advocacy for inflationary increases and enrolment growth funding; stable expenses and a preliminary increase of 1-2 percent to enrolment for fiscal year (FY) 2024; and the implementation of budget model 2.0 in FY 2025 with preliminary targets and budget letters to colleges and faculties by the end of 2023.

BOARD OF GOVERNORS' MOTION SUMMARY

On the recommendation of the Finance and Property Committee, the Board of Governors approved an amendment to the composition of the University of Alberta Properties Trust Inc. Board of Directors within By-Law No. 1.

On the recommendation of the Learning, Research and Student Experience Committee, the Board of Governors approved the amended 2022-23, 2023-24 and 2024-25 Investment Management Agreement domestic enrolment targets and thresholds.

INFORMATION REPORTS

The Board received reports from its standing committees, the Chancellor, Alumni Association, Students' Union, Graduate Students' Association, Association of Academic Staff of the University of Alberta, Non-Academic Staff Association, and General Faculties Council.

Prepared for: Dilini Vethanayagam, GFC Representative on the Board of Governors

By: Erin Plume, Associate Board Secretary

Please note: official minutes from the open session of the October 13, 2023 Board of Governors' meeting will be posted on the [University Governance website](#) once approved by the Board at its December 8, 2023 meeting.



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President's Report to General Faculties Council

November 20, 2023



From the Desk of President Bill Flanagan

We continue to advance the U of A in several significant ways following the successful launch of [Shape: A Strategic Plan of Impact](#). In October, we launched the [University of Alberta Innovation Fund](#) and [Forward with Purpose: A Strategic Plan for Research and Innovation](#). Both plans align and support the ambitious vision outlined in our 10-year university strategic plan.

The **Innovation Fund** sees us deepening our connections with industry and community. With philanthropic support, the fund will help grow the entrepreneurial ecosystem in Alberta and ensure that great ideas move from the lab bench to the marketplace. The fund is an independent entity wholly owned by the university with a board composed of experts and a team led by CEO Sheetal Mehta Walsh. I'm grateful to everyone who has been part of building this fund.

I am also delighted by the release of **Forward with Purpose**, a university-wide research and innovation plan led by Dr. Aminah Robinson Fayek, vice president (Research and Innovation.) This plan will help strengthen one of the U of A's core pillars and build on our incredible research history. It outlines a path forward for the research, innovation, and creative activities landscape. Thank you to Aminah and the entire team who contributed to this plan.

We are also moving forward with our **People Strategy**. The recent Faculty and Staff Engagement Survey shows mixed results and highlights areas for improvement. We are committed to transparency and approach this work with humility. As reflected in *Shape*, people are our biggest strength, and we will take deliberate and thoughtful steps to create a culture where people feel valued, respected, and included and have the opportunity to achieve their full potential. The U of A's senior leadership team is committed to this work. I want to thank Todd Gilchrist, vice-president (University Services and Finance) and Dr. Verna Yiu, interim provost and vice-president (Academic), for co-leading the strategy development. I hope GFC members participate in the [community consultations](#).

Leadership

School of Public Health interim dean – I am pleased Dr. Jeffrey Johnson agreed to extend his appointment as interim dean of the School of Public Health until June 30, 2025. His lengthy history as a researcher and leader includes serving as associate dean of Education in the School of Public Health and working with national and provincial agencies in diabetes and public health policy and health service.



Recruiting provost and chancellor – The U of A is recruiting two high-profile roles: chancellor and provost. I hope to announce a successful [provost candidate](#) in the coming months. Dr. Verna Yiu has held this key position in an interim capacity since July 1, 2022. We are also looking for our 23rd chancellor, an important ambassador role that requires an individual to strengthen connections between the university and the community. Chancellor Peggy Garrity's term ends in spring. [Learn more](#) about the chancellor position and our recruitment process.

Advancing the U of A

Global and national rankings – The U of A continues to be recognized as a world leader in education and research excellence. Rankings' success is a reflection of the talented faculty and staff at the institution. Several recent highlights include:

- [Five subjects](#) ranked among the world's top 50 in the 2023 Global Ranking of Academic Subjects, with four deemed best in Canada.
- The 2024 Times Higher Education World University Rankings by Subject had [four subjects](#) ranked among the top 100 – all showed gains in the rankings, released in October.
- U of A is now among the top six per cent of institutions included in the respected [Times Higher Education](#) global rankings.

President's Speaker Series – Three U of A artificial intelligence trailblazers generated a dynamic conversation at the second President's Speaker Series. *Artificial Intelligence: The Risks, the Rewards, the Realities* featured Faith Majekolagbe, assistant professor of law, Patrick Pilarski, associate professor in the department of medicine and Martha White, associate professor of computing science. It was a timely discussion that helped share the extraordinary knowledge and discovery happening at the U of A. If you weren't able to attend, you can [watch the discussion](#).

THE conference – I was pleased to represent the U of A as a keynote speaker and panelist at the recent Times Higher Education Innovation & Impact Summit in Shenzhen, China. I shared how the U of A's innovative research, education excellence, and community engagement benefit all. While there, I also joined the Hong Kong alumni chapter for its 45th anniversary celebration. It was wonderful to hear how people use their U of A education to contribute to professions, communities, and families.

The U of A's leadership in climate change – A small U of A contingent, including Dr. Aminah Robinson Fayek, vice-president (Research and Innovation), will join me at the UN Climate Change Conference in Dubai in early December. COP 28 will include robust discussions and thought leadership about climate change, including an assessment of progress towards the goals of the 2015 Paris Agreement. The U of A's active participation affirms our commitment to tackling climate change and positioning the U of A as a global leader in the research and development of net-zero energy solutions.

U of A community

Excellence in undergraduate teaching – I am delighted to recognize this year's recipients of the



[Provost's Award for Early Achievement of Excellence in Undergraduate Teaching](#). Filsan Ahmed Youssouf is a faculty service officer at Campus Saint-Jean (right), and her physics lab is a certified gold green space. Willow White is a feminist literary historian and assistant professor of English and Indigenous Studies at Augustana Campus and is a proud citizen of the Métis Nation of Alberta. They exemplify the calibre of faculty and staff at the U of A. Please join me in congratulating them.

2023 Killam Laureates – This year, 26 graduate students, postdoctoral fellows, and faculty members have been awarded a prestigious Killam endowment made possible by the generosity and vision of Izaak Walton Killam and his wife, Dorothy Johnston Killam. The awards recognize excellence in academic achievement, leadership, and teaching and research. It was inspiring to meet these incredible recipients at a celebration lunch.

AI course – I am looking forward to the launch of the [Artificial Intelligence Everywhere](#) course in January. The course is open to all undergraduate students and is part of a new AI certificate, one of the first in Canada. We are excited about another collaboration with our partners at Amii.

Geoffrey and Robyn Sperber Health Sciences Library – This innovative learning space opened in the Edmonton Clinic Health Academy this fall. [The library](#) features collaboration space and outstanding technology, including 3-D printers and virtual reality. We are grateful to Geoffrey, who has had deep connections to the U of A for over 60 years, and Robyn for their generosity in making the library a reality.

As we near the end of 2023, I share a sincere message of gratitude to every member of GFC. Thank you for your contributions and commitment to the University of Alberta.

Bill Flanagan
President and Vice-Chancellor



John Lemieux <jlemieu1@ualberta.ca>

Fwd: Budget Model 2.0 Information and Discussion Sessions

1 message

Kate Peters <peters3@ualberta.ca>

Tue, Nov 14, 2023 at 2:53 PM

To: John Lemieux <jlemieu1@ualberta.ca>

Please print to November 20, Information sent between meetings

Kate Peters | Pronouns: She/Her/Elle

Secretary to General Faculties Council (GFC) and Manager, GFC Services

----- Forwarded message -----

From: **Kate Peters** <peters3@ualberta.ca>

Date: Tue, 10 Oct 2023 at 13:54

Subject: Budget Model 2.0 Information and Discussion Sessions

To:

Cc: Faiza Billo <faiza.billo@ualberta.ca>, Heather Richholt <richholt@ualberta.ca>

Sent on behalf of Todd Gilchrist and Verna Yiu:

To GFC Members:

As you are all aware, Budget Model 2.0 has been developed based on the principles approved by the GFC and Board of Governors and is being implemented for fiscal year 2025.

We will deliver an optional two-part training session to provide GFC members with further detail on the model. Session 1 will focus on the model and how it works. Session 2 will go into greater depth by explaining the fundamental elements of Budget Model 2.0 through a FY2024 scenario. Session 2 will build on the content from Session 1.

The sessions are scheduled as follows:

Session 1: November 6, 8:30 AM - 10:30 AM (via Zoom)

Session 2: November 9, 12 PM - 2 PM (via Zoom)

We ask that you sign up for the session via this [GoogleForm](#). The Zoom link will be forwarded via calendar invite to you in advance of the session.

Regards,

Verna Yiu and Todd Gilchrist.

Kate Peters | Pronouns: She/Her/Elle

Secretary to General Faculties Council (GFC) and Manager, GFC Services

UNIVERSITY OF ALBERTA

University Governance

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**L'Université de l'Alberta reconnaît respectueusement
que nous sommes situés sur le territoire des traités 6, 7 et 8,
terres traditionnelles des Premières Nations et des Métis.**

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