Thursday, November 3, 2022
2-725 Students’ Union Building (SUB)
4:00 PM - 6:00 PM
If you require this document in an alternate format, please email faiza.billo@ualberta.ca

*Join us for a tour of the Campus Food Bank (1-81 SUB) at 3:30 PM.

OPENING SESSION 4:00 - 4:05 PM

1. Approval of the Agenda Verna Yiu
2. Approval of the Open Session Minutes of September 15, 2022 Verna Yiu
3. Comments from the Chair (no documents) Verna Yiu

DISCUSSION ITEMS

4. Updates on unprecedented demand at the Campus Food Bank Kevin Friese
   4:05 - 4:20 PM Erin O’Neil
   - Preliminary Report of Campus Food Bank Survey Findings Fall 2022
   - Monthly output Sept 2018 – Sept 2022
5. Online and Continuing Education (no documents) 4:20 - 4:40 PM Jessica Butts Scott
6. Tuition Proposal 4:40 - 5:00 PM – materials will be posted when they are available Melissa Padfield
7. Student Financial Support Annual Report To Our Community and Accompanying Overview 5:00 - 5:20 PM Melissa Padfield Norma Rodenburg
8. Early consultation on development of the University Strategic Plan (USP) Verna Yiu
   5:20 - 5:30 PM Logan Mardhani-Bayne
9. Student Updates (no documents) 5:30 - 5:45 PM
10. Question Period 5:45 - 6:00 PM

CLOSING SESSION

11. Adjournment
   - Next meeting of COSA: January 26, 2023
   - Next meeting of GFC: November 14, 2022

Presenters:
Verna Yiu Interim Provost and Vice-President (Academic)
Kevin Friese  Assistant Dean of Students
Erin O'Neil  Executive Director, Campus Food Bank
Jessica Butts Scott  Associate Vice-President (Online and Continuing Education)
Melissa Padfield  Deputy Provost, Students & Enrolment
Norma Rodenburg  Acting Vice-Provost and Registrar
Logan Mardhani-Bayne  Strategic Development Manager

Documentation was before members unless otherwise noted.

Meeting REGRETS to: Heather Richholt, richholt@ualberta.ca
Prepared by: Heather Richholt, Committee Coordinator
University Governance  www.governance.ualberta.ca
ATTENDEES:
Verna Yiu, Chair
Chantel Akinneah
Bishoi Aziz
Dhir Bid
Gurleen Kaur (delegate)
Keith King
Lionel Liu
Precious Majekodunmi
Brooke Milne

Jennifer Passey
Norma Rodenburg
Ravina Sanghera (delegate)
Srivathsan Shanmuganathan
Pien Steinbusch
Adrian Wattamaniuk
Tuesday Young
non-voting:
Kate Peters

REGRETS:
Abdul Abbasi
Daniela Carbajal
André Costopoulos
Brad Hamdon
Ariane Lamoureux
Abner Monteiro

Staff:
Heather Richholt, Coordinator

OPENING SESSION

1. Approval of the Agenda

Presenter(s): Verna Yiu, Interim Provost and Vice-President (Academic) and Chair of the Council on Student Affairs (COSA)

The motion was moved and seconded.

THAT the Council on Student Affairs approve the agenda.

CARRIED

2. Approval of the Open Session Minutes of March 3, 2022

Presenter(s): Verna Yiu, Interim Provost and Vice-President (Academic) and Chair of COSA

The motion was moved and seconded.

THAT the Council on Student Affairs approve the March 3, 2022 minutes.

CARRIED

3. Comments from the Chair (no documents)

Presenter(s): Verna Yiu, Interim Provost and Vice-President (Academic) and Chair of COSA

Discussion:
The Chair began by expressing her thanks to students for their support of COSA and relating her background in student affairs. She acknowledged the successful Week of Welcome activities but recognised that this is also a difficult time for many students and that mental health supports are available.
The Chair related some changes to the Office of the Provost’s leadership team including the appointment of a Deputy Provost (Academic) and a Deputy Provost (Students and Enrolment).

The Chair thanked Bishoi Aziz, Vice-President (Academic) of the Graduate Students’ Association, for agreeing to serve as Vice-Chair of COSA for the 2022-2023 academic year.

4. **Committee Orientation**

Materials before members are contained in the official meeting file.

*Presenter(s):* Kate Peters, Secretary to General Faculties Council (GFC); Heather Richholt, Committee Coordinator

*Discussion:* Committee orientation included discussion about the history of the committee, its role within the structure of GFC, and the composition of the committee. Members were informed about the value of their comments and questions to shape proposals and were encouraged to read the Indigenous Strategic Plan and use it as a lens when reviewing items before the committee.

**DISCUSSION ITEMS**

5. **Revisions to Sexual Violence Policy and new Student Conduct Policy (to replace non-academic portions of the Code of Student Behaviour)**

Materials before members are contained in the official meeting file.

*Presenter(s):* Deborah Eerkes, Sexual Violence Response Coordinator

*Discussion:* The committee discussed the changes that had been proposed to the Sexual Violence Policy and the creation of a new Student Conduct Policy suite. Members were also informed about the proposed rescissions of the non-academic sections of the Code of Student Behaviour. D Eerkes also spoke about the principles that underpinned her work as well as the extensive consultation that had been undertaken to bring the suite forward. The importance of the changes and the required shift in practices was noted as was the consensus in support of the principles behind the changes.

Members were supportive of the changes and expressed an interest in the supports available for LGBTQ2+ members and engagement with groups on Campus. The committee discussed the importance of implementation and how to put in place practices that align with the framework set out in the policy. They emphasized how important the response was and that it could be preventative.

6. **Exam Procedures and Deferred Exams**

Materials before members are contained in the official meeting file.

*Presenter(s):* Norma Rodenburg, Interim Vice-Provost and University Registrar

*Discussion:* The need to review the policies in the Calendar in light of the changes to practice in response to the pandemic were reviewed and members were invited to provide feedback on the proposal. Members asked about the possibility of opening a conversation on use of handwritten exams.
7. **Exploration Credits Update**

Materials before members are contained in the official meeting file.

*Presenter(s):* Norma Rodenburg, Interim Vice-Provost and University Registrar

**Discussion:**

After providing a high level update on the rationale behind the proposal and the need for the clarification of the language, members discussed the value of the policy. Members expressed concerns that large numbers of exclusions would limit the impact of the policy. The value of this kind of policy for graduate students was discussed and members asked if there were plans for a similar policy for graduate students. Members heard that there were different needs for graduate students and that any policy would need to accommodate program requirements. Members expressed concerns that an omnibus proposal to exclude large numbers of courses would come forward and heard that Faculties would need to go through multiple levels of approval. It was noted that the policy sets out some parameters for what would be eligible and that Faculties would need to provide rationale for any proposals. Members suggested that in the future, Faculties may want to develop courses that were intended to be exploration courses that would allow students to test the waters and explore different disciplines and programs.

8. **Student Accessibility Assessment Project Report**

Materials before members are contained in the official meeting file.

*Presenter(s):* Allen Ball, Associate Dean (Student Programs) and Professor; Melissa Padfield, Deputy Provost (Students & Enrolment)

**Discussion:**

A Ball explained the two-pronged approach to develop the report which included interviews with 80 stakeholders from across the University and then a large survey that went out to faculty, students, and staff asking for their perspectives on accessibility. He noted that the data from these two sources led to the five recommendations in the report and that, in summary, better coordination of the existing supports in the University was needed.

Dean of Students representatives in attendance, R Sanghera and K Friese, provided additional information on the current projects to address some of the identified gaps and opportunities. The Office of the Dean of Students is eager to see greater collaboration and coordination with services that exist in the Faculties and to improve policies that address accommodation. In addition, there are opportunities to improve training both centrally and in the Faculties. The work on examinations was highlighted and a need for an exam centre where students requiring accommodations can write exams. They concluded by recognising that students are often bounced around when searching for support.

M Padfield provided a broad outline for next steps and emphasized the importance of COSA in informing the work as it moved forward.

Members reflected that they were encouraged to see the concerns of students reflected in the report. They asked about the timelines for implementation of the recommendations, accountabilities for the implementation including central administration, the Colleges, and the Faculties. They heard that work had already begun and that this coordinated approach aligns with the One University Strategy. Members asked about the efforts to centralise services and how students would be served at all levels of the university. They heard that better coordination to deploy services more effectively may mean that more resources are not required. The committee discussed student rights and responsibilities and how students who face barriers needed support to ensure equity. The creation of a new position for a Vice-Provost (Equity, Diversity and Inclusivity) was noted and the Committee heard that accessibility had been added to that role.
An observer was invited to speak and they asked how students with disabilities will be consulted every step of the way during implementation and how the legal requirements for accommodation will be met. Members asked about how students could be empowered to make requests for accommodation that would best meet their needs, in addition to the University providing broad supports that may or may not fit individual specific needs. Finally, the observer asked how students with disabilities can be made to feel welcome on campus noting the stigma around disability and resulting isolation. They asked how the University could support education to reduce these stigma. The proponents thanked the observer for their questions and expressed deep appreciation for the concerns raised.

Members discussed the barriers presented by buildings on campus when reviewed through an accessibility lens. A suggestion was made to create maps that allow students with accessibility issues to navigate campus through accessible pathways. The need to carefully communicate with students to not set up adversarial relationships between instructors and students was expressed. Members discussed the need to ensure that students and instructors have clear pathways to get advice and support about their rights and responsibilities, and the need for broader conversations about accessibility that go beyond examinations and assessment and speak to other barriers in the learning environment.

9. Question Period

Presenter(s): Verna Yiu, Interim Provost and Vice-President (Academic) and Chair of COSA

Discussion:
Members asked about the integration of intersectionality in the accommodation policy work and whether broader inclusivity themes could be addressed. Members asked if an auto caption could be included to make meetings more accessible. Students asked about a merger of student offices in the School of Business and the impact on student services.

10. Updates (no documents)

A. Students’ Union

Presenter(s): Gurleen Kaur, Vice-President (Academic) University of Alberta Students’ Union (UASU)

Discussion:
G Kaur described the Week of Welcome activities and invited all members of the University Community to participate in the attempt to break the world record for the largest dodgeball game on September 23rd.

B. Graduate Students’ Association

Presenter(s): Bishoi Aziz, Vice-President (Academic) Graduate Students’ Association (GSA)

Discussion:
B Aziz noted the activities to welcome graduate students and inform them about services offered by the GSA. In addition, he noted that advocacy activities with the Minister of Advanced Education were an opportunity for the GSA to emphasize food insecurity of students.

CLOSING SESSION

11. Adjournment

- Next meeting of COSA: November 3, 2022
- Next meeting of GFC: September 19, 2022
# Governance Executive Summary

## Advice, Discussion, Information Item

<table>
<thead>
<tr>
<th>Agenda Title</th>
<th>Student Financial Support Annual Report To Our Community and Accompanying Overview</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Item</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposed by</td>
<td>Norma Rodenburg, Acting Vice Provost and University Registrar</td>
</tr>
<tr>
<td>Presenter</td>
<td>Melissa Padfield, Deputy Provost (Students and Enrolment) Norma Rodenburg, Acting Vice Provost and University Registrar</td>
</tr>
</tbody>
</table>

## Details

<table>
<thead>
<tr>
<th>Office of Administrative Responsibility</th>
<th>Office of the Registrar</th>
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</thead>
<tbody>
<tr>
<td>The Purpose of the Proposal is</td>
<td>In the attached report, the RO provides a snapshot of the current state of undergraduate and graduate financial supports issued by the Office of the Registrar (RO) in the 2021/22 fiscal year. Annual reporting to administrative and governance committees on student financial support is part of the Office of the Registrar’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. This year, changes were made to the report, which now provides an overview of our strategy to ensure that “qualified undergraduate and graduate students can attend the university through the provision of robust student financial support”1, key facts as well as trends and patterns over time. Also new is a section on “What’s Next”, which outlines the work the RO has been doing to develop new programs and processes that align the administration of financial supports with the Equity, Diversity and Inclusion (EDI) and Indigenous Initiatives (II) of the university.</td>
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</table>

## Executive Summary

The report provides details on the financial support administered by the RO for fiscal year 2021/22, giving details on spending for domestic, Indigenous, international, and graduate financial support expenditures. The associated overview gives a quick reference of statistics and figures.

## Supplementary Notes and context

**Engagement and Routing** (Include proposed plan)

**Those who have been informed:**

The following stakeholders have seen the report for discussion and feedback:

- Kathryn Todd, Deputy Provost (Academic)
- Janice Causegrove-Dunn, Vice Provost Programs: September 26, 2022
- Kelly Spencer, Associate Vice-President, VER Development and Alumni Relations: September 26, 2022
- Edith Finczak, Office of the Provost and Vice-President (Academic): September 26, 2022
- Kathleen Brough, Senior Administrative Officer: September 26, 2022
### Item No. 7

- Carley Roth, Portfolio Initiatives Manager: September 26, 2022
- Florence Glenfield, Vice-Provost Indigenous Programming & Research: September 26, 2022
- Evelyn Hamdon, Senior Advisor, Equity & Human Rights: September 26, 2022
- André Costopoulos, Dean of Students: September 26, 2022
- Ravina Sanghra, Acting Associate Dean (Students): September 26, 2022
- Shana Dion, Assistant Dean FNMI Student Services: September 26, 2022
- Alexis Ksiazkiewicz, Government & Stakeholder Relations: September 26, 2022
- Ali Shiri, Vice Dean, Faculty of Graduate Studies and Research: September 26, 2022
- Cen Huang, Vice Provost and AVP International: September 26, 2022
- Doug Weir, Executive Director, Student Programs & Services, University of Alberta International: September 26, 2022
- John Gregory, Director, International Recruitment & Transnational Programs: September 26, 2022
- Abner Monteiro, Students’ Union President: September 26, 2022
- Anas Fassih, Graduate Students’ Association President: September 26, 2022

**Those who have been/will be consulted:**
- Provost’s Council: Oct 17, 2022
- PEC-O: Oct 20, 2022
- Advisory Committee on Undergraduate Financial Support (ACUS): Oct 28, 2022
- Advisory Committee on Enrolment Management (ACEM): Oct 28, 2022
- Dean’s Council: Nov 2, 2022
- COSA: Nov 3, 2022 (for discussion)
- GFC: Nov 14, 2022 (for information)
- APC: Nov 16, 2022 (for discussion)
- BLRSEC: Nov 25, 2022
- BFPC: Nov 29, 2022

**Those who are actively participating:**
- Melissa Padfield, Deputy Provost Student & Enrolment
- Norma Rodenburg, Acting Vice Provost and University Registrar
- Anna Hughes, Associate Registrar
- Fiona Halbert, Assistant Registrar Student Financial Support
- Erin Stepney, Assistant Registrar Enrolment Analytics and Insights

### Strategic Alignment

**Alignment with For the Public Good**

1. **OBJECTIVE:** Build a diverse, inclusive community of exceptional undergraduate and graduate students from Edmonton, Alberta, Canada, and the world.
   i. **Strategy:** Develop and implement an undergraduate and graduate recruitment strategy to attract top students from across the diverse communities in Alberta and Canada, leveraging our strengths as a comprehensive research-intensive, multi-campus university with options for francophone and rural liberal arts education.
   ii. **Strategy:** Develop and implement an undergraduate and graduate recruitment and retention strategy to attract top Indigenous students.
   iii. **Strategy:** Optimize our international recruiting strategies to attract well-qualified international students from regions of strategic importance, and enhance services and programs to ensure their academic success and integration into the activities of the university.
**iv. Strategy:** Ensure that qualified undergraduate and graduate students can attend the university through the provision of robust student financial support.

<table>
<thead>
<tr>
<th>Alignment with Core Risk Area</th>
<th>Please note below the specific institutional risk(s) this proposal is addressing.</th>
</tr>
</thead>
<tbody>
<tr>
<td>☒ Enrolment Management</td>
<td>☒ Relationship with Stakeholders</td>
</tr>
<tr>
<td>☐ Faculty and Staff</td>
<td>☒ Reputation</td>
</tr>
<tr>
<td>☒ Funding and Resource Management</td>
<td>☐ Research Enterprise</td>
</tr>
<tr>
<td>☐ IT Services, Software and Hardware</td>
<td>☐ Safety</td>
</tr>
<tr>
<td>☐ Leadership and Change</td>
<td>☒ Student Success</td>
</tr>
<tr>
<td>☐ Physical Infrastructure</td>
<td></td>
</tr>
</tbody>
</table>

| Legislative Compliance and jurisdiction | 1. *Post-Secondary Learning Act (PSLA):* The PSLA (Section 26(1)(o))
2. *PSLA Section 60(1)(b)*
3. GFC Academic Planning Committee Terms of Reference
Mandate of the Committee
4. General Faculties Council Terms of Reference (1. Mandate of the Committee)
5. GFC Executive Committee Terms of Reference (1. Mandate of the Committee)
6. Board Learning, Research and Student Experience Committee (BLRSEC) Terms of Reference/Mandate of the Committee (1. Mandate and Role of the Committee)
7. Board Finance and Planning Committee (BFPC) Terms of Reference/Mandate of the Committee (1. Mandate and Role of the Committee)
8. UAPPOL Undergraduate Student Financial Supports Procedure, Section 6. Annual Reporting |

Attachments (each to be numbered 1 - <>)

1. Student Financial Support Annual Report To Our Community (pages 1 – 18)
2. Overview – Annual Report on Undergraduate Student Financial Support (pages 19-22)

*Prepared by:* Fiona Halbert, Assistant Registrar Student Financial Support, [Fiona.halbert@ualberta.ca](mailto:Fiona.halbert@ualberta.ca)
Student Financial Support
2021/22

Date:
SEPTEMBER 2022
# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Page</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>MESSAGE FROM THE REGISTRAR</td>
</tr>
<tr>
<td>2</td>
<td>OVERVIEW OF STUDENT FINANCIAL SUPPORT</td>
</tr>
<tr>
<td>3</td>
<td>FINANCIAL SUPPORT ADMINISTERED BY THE REGISTRAR’S OFFICE</td>
</tr>
<tr>
<td>6</td>
<td>NEED-BASED DEMAND AND ENROLMENT</td>
</tr>
<tr>
<td>8</td>
<td>STEWARDSHIP</td>
</tr>
<tr>
<td>9</td>
<td>PARTNERSHIPS</td>
</tr>
<tr>
<td>10</td>
<td>ACCESS</td>
</tr>
<tr>
<td>15</td>
<td>WHAT’S NEXT</td>
</tr>
</tbody>
</table>
MESSAGE FROM THE REGISTRAR

Since 2016, the Office of the Registrar (RO) has created the Student Financial Support Annual Report to increase transparency around the financial support programs administered by the RO and how these supports are accessed by domestic, international and Indigenous students. This year, we are introducing a new and condensed version of the report (The Student Financial Support Annual Report to our Community) which provides an overview of our strategy to ensure that “qualified undergraduate and graduate students can attend the university through the provision of robust student financial support”\(^1\), key facts and figures as well as trends and patterns over time. We have also included a section on “What’s Next”, which outlines the work the RO has been doing to develop new programs and processes that align the administration of financial supports with the Equity, Diversity and Inclusion (EDI) and Indigenous Initiatives (II) of the university.

We are steadfast in our commitment to continually 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

OVERVIEW OF STUDENT FINANCIAL SUPPORT

The University of Alberta maintains a strong and evolving commitment to the financial support of its undergraduate and graduate students. With the rising costs of education, providing support for qualified students with financial barriers is a high priority. 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 government\(^2\).

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1 For the Public Good, University of Alberta Institutional Strategic Plan.
2 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

Funding sources include:

- Donor
- Government (merit-based)
- University operating
- University tuition offset

TOTAL RO ADMINISTERED FINANCIAL SUPPORT

In 2021/22, the Office of the Registrar (RO) administered $43.7M in financial support to undergraduate and graduate students. $40.6M in funding was administered to undergraduate students, a 17.6% increase year-over-year in total funding and a 17.8% increase in the number of students receiving funding. $3.08M in funding was administered to graduate students, a 12.5% increase year-over-year in total funding and a 5.8% decrease in the number of students receiving funding.³

FIGURE 1: TOTAL RO ADMINISTERED FINANCIAL SUPPORT 2021/22

³ The RO only focuses on need-based supports for graduate students. The majority of graduate student funding (including merit-based funding) is administered by other units and faculties.
RO ADMINISTERED 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.

Of the $40.6M spent on undergraduate students, 74.1% ($30.1M) went to merit-based supports and 25.9% ($10.5M) went to need-based supports.

Of the $3.08M spent on graduate students, 6.8% ($208K) went to merit-based supports and 93.2% ($2.9M) went to need-based supports. The RO only focuses on need-based supports for graduate students.

Overall, 69.4% of RO administered funding went to merit-based supports, and 30.6% to need-based supports. Of the $30.3M spent on merit-based supports, 74.8% ($32,691,070) went to domestic students (25.2% or $11,000,968 went to international students). Domestic students make up 81% of total enrolment (UG + Grad), so this proportion is close to total enrolment. Of the $13.37M spent on need-based supports, 74.8% ($10,001,453) went to domestic students (25.2% or $3,371,108 went to international students).

Growing up in Edmonton, the university community has always been a source of inspiration and pride for me. I was honoured to receive the Chancellor’s Entrance Citation upon applying to the University of Alberta and during my undergraduate years, the financial support from the scholarship has granted me more time to give back to the community through volunteerism for sustainable initiatives and representation of mental health. I am incredibly grateful for the recognition and certainly will continue to work towards the betterment of health and sustainability across the university and in my career as a health professional!

Fanle, Faculty of Nursing | Edmonton
RO ADMINISTERED NEED-BASED SPENDING

In 2021/22, $13.37M was issued through need-based supports.

- 74.8% ($10,001,453) of need-based funding went to domestic students; 25.2% ($3,371,108) went to international students.
- 78.5% ($10,497,453) of need-based funding went to undergraduate students; 21.5% ($2,875,108) went to graduate students.

**FIGURE 3: RO ADMINISTERED NEED-BASED SPENDING BY CITIZENSHIP STATUS 2021/22**

74.2% of need-based spending came from university sources (operating and tuition offsets).

- 27.5% university operating ($3,672,615)
- 46.8% tuition offset ($6,255,853)
- 25.8% donor ($3,444,096) - donor includes Access Fund Bursary and 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% 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.
NEED-BASED DEMAND AND ENROLMENT

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 2021/22, the number of students with an unfunded financial shortfall decreased by 41.1% (139 students). We were fortunate to have an increase in funding to put towards bursaries which increased the annual maximums available to students. As a result, more students received money and less need remained. 132 more students (11.8%) received bursaries in 2021/22 compared to 2020/21.

All students with an assessed financial shortfall received bursary funding in 2021/22. No eligible students were denied bursary support.

FIGURE 4: BURSARY DEMAND AND TOTAL ENROLMENT

TABLE 1

<table>
<thead>
<tr>
<th></th>
<th>2020/21</th>
<th>2021/22</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate</td>
<td>34,108</td>
<td>34,889</td>
</tr>
<tr>
<td>Graduate</td>
<td>8,204</td>
<td>8,402</td>
</tr>
<tr>
<td>Applicants</td>
<td>1,121</td>
<td>1,312</td>
</tr>
<tr>
<td>Funded</td>
<td>869</td>
<td>981</td>
</tr>
<tr>
<td>Unfunded</td>
<td>260</td>
<td>151</td>
</tr>
<tr>
<td>Financial Shortfall</td>
<td>78</td>
<td>48</td>
</tr>
</tbody>
</table>
In 2021/22, the annual maximums of bursaries increased across all three student types (undergraduate non-professional, undergraduate professional and graduate). This increase in funding is the result of increases in the tuition offset revenue collected by the university.

**Average Cost 2021/22**

- Moderate Standard of Living + Average Tuition = $24,500
- Average Bursary was $10,259
- Increased by 11.4% compared to 2020/21

For students facing financial shortfalls, on average 42% of the cost to attend university is covered by bursary support.

In 2021/22, 0.46% of the total undergraduate and graduate enrolment (199 students) had an unfunded financial shortfall. In 2020/21, the total unfunded shortfall was $2.96M. In 2021/22, the total unfunded shortfall was $2.26M, a 23.5% decrease compared to the previous year. Of the 199 students with an unfunded financial shortfall, 139 students were domestic (0.40% of domestic enrolment) and 60 students were international (0.73% of international enrolment).

52% of graduate bursary recipients had their financial shortfall met with bursary funding, leaving 0.57% of the total graduate enrolment (48 students) with an unfunded financial shortfall.

85% of undergraduate bursary recipients had their financial shortfall met with bursary funding, leaving 0.43% of the total undergraduate enrolment (151 students) with an unfunded financial shortfall.

For students in non-professional undergraduate and graduate programs, 124 students (52.4% domestic and 47.6% international) had an unfunded shortfall of $890,000. This represents 0.31% of non-professional undergraduate and graduate enrolment. 41.9% ($373,000) of the total unfunded shortfall was domestic; 58.1% ($517,079) of the total unfunded shortfall was international.
### TABLE 2: UNFUNDED FINANCIAL SHORTFALL

<table>
<thead>
<tr>
<th>Student Type</th>
<th>Number of Students</th>
<th>Dollar Amount</th>
<th>% of Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate non-professional</td>
<td>76 (0.24% of enrolment)</td>
<td>$538,379</td>
<td>23.8%</td>
</tr>
<tr>
<td>Undergraduate professional</td>
<td>75 (2.33% of enrolment)</td>
<td>$1,370,900</td>
<td>60.6%</td>
</tr>
<tr>
<td>Graduate</td>
<td>48 (0.57% of enrolment)</td>
<td>$351,700</td>
<td>15.6%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>199 (0.46% of total enrolment)</strong></td>
<td><strong>$2,260,979</strong></td>
<td><strong>100.0%</strong></td>
</tr>
</tbody>
</table>

### STEWARDSHIP

The RO continues to be strong stewards of institutional resources. In 2021/22, 92.9% of revenue collected through the university tuition offsets was spent.

90.8% of international tuition offset revenue was spent in 2021/22. Our inability to spend the full amount of the offset within this year is the result of irregularities in international undergraduate student behaviour and enrolment. 75% of international tuition offset is planned for spending on recruitment merit-based supports. Yield and registration of international undergraduate students continued to be impacted by the pandemic and spending on international undergraduate merit-based supports was lower than planned (70%). Any unspent funding will be used to support recruitment in the 2022/23 year, ensuring the funding continues to be allocated as intended.

### TABLE 3: UNIVERSITY TUITION OFFSET REVENUES AND SPENDING, 2021/22

<table>
<thead>
<tr>
<th>Revenue Type</th>
<th>Total Offset Revenue</th>
<th>Undergraduate</th>
<th>Graduate</th>
<th>Total Spend</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic Tuition Offset</td>
<td>$3,700,000</td>
<td>$3,248,603</td>
<td>$389,050</td>
<td>$3,637,653</td>
<td>98.3%</td>
</tr>
<tr>
<td>International</td>
<td>$9,700,000</td>
<td>$7,599,707</td>
<td>1,210,800</td>
<td>$8,810,507</td>
<td>90.8%</td>
</tr>
<tr>
<td><strong>Tuition Offset Total</strong></td>
<td><strong>$13,400,000</strong></td>
<td><strong>$10,848,310</strong></td>
<td>$1,599,850</td>
<td><strong>$12,448,160</strong></td>
<td><strong>92.9%</strong></td>
</tr>
</tbody>
</table>

The RO holds administrative responsibility for 1,802 endowments. Collectively, the market value of all these endowments (as of March 31, 2021) was $256,118,600.94. The RO continuously seeks to maximize spending of our donor endowed funds. The pandemic impacted spending of some endowed funds due to restrictions in award criteria connected to programs/opportunities (such as education abroad and travel) that had limited offerings during the last year.

The RO continuously monitors donor spending to ensure spending of endowments aligns with university policy and institutional goals to maximize spending of annual earnings. 85% of the individual endowments held by the RO had spending (at least) equivalent to the fund’s annual spending allocation; however, the 15% of the funds which did not see spending equivalent to annual earnings account for nearly one-third of the total spending allocation available. The RO seeks to increase its endowment annual spending allocation from 85% to 90%.

Attention will be focused on the relatively small number of endowments which are difficult to spend in order to ensure that the full suite of endowments held by the RO are spent efficiently relative to the total amount of annual spending allocation available. The RO will work closely with the Office of Advancement to achieve this goal.
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 $198,616 to 14 students in 2021/22.

In 2021/22, 14,056 domestic undergraduate students received financial support through the provision of Canadian government loans (both federal and provincial) for a total of $136,562,301. 47% of all domestic undergraduate students accessed government loans with relatively even distribution across years of study.

In 2021/22, the number of undergraduate students accessing loans and the total value of loans accessed increased by 9% (1,202 students) and 17% ($20.1M) respectively, with the average amount per student increasing by $640. This trend could be attributed to a return to in-person learning and the associated changes in student living expenses.

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 2021/22, 86.4% of Alberta undergraduate loan borrowers received some type of grant funding. 10,729 domestic undergraduate students received an income-based grant which is primarily comprised of federal funding. This represents 41% of Alberta students.

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

888 domestic graduate students received $15.2M in government loans, a 9.4% ($1.3M) increase from the prior year.

26.4% (1,345) of domestic graduate students accessed government loan funding and 17.4% (888) received government grants.
FIGURE 7: 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 2021/22.

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 98.9% increase in spending on need-based supports since 2019/20.

Since 2019/20, there has been a 98.9% increase in spending on need-based supports.

FIGURE 8: UNIVERSITY OPERATING SPENDING ON NEED-BASED SUPPORTS
INTERNATIONAL UNDERGRADUATE STUDENTS

For international students, our approach has been an impactful combination of planned and flexible funding. In response to COVID-19, Quarantine Support Grant funding was made available and we continued to provide support for transfer students. Ukrainian students suffering financial hardship due to the war are also being provided with funding support, including waiving 2022/23 tuition fees for Ukrainian Study Permit holders.

The University has increased its competitiveness with a new recruitment scholarship strategy which includes the President’s Distinction Scholarship, a large and renewable scholarship that provides $120,000 over four years to qualified students. In addition, annual maximums increased, decreasing the number of international students with unfunded financial shortfall. 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 Applications which will allow for improved student application process.

In 2021/22, 1,731 or 35% of international students (5% of total undergraduate enrolment) received financial supports. Students from 74 countries received financial supports. Overall spending on international students in 2021/22 increased by $1,549,376 (20%).

This is the second year a seven figure increase in spending occurred. In 2020/21, there was a 23% increase in overall international financial support spending (a total of $1,451,891).

To support recruitment, $1,000 grants were offered to all new incoming international transfer students who registered in both Fall and Winter semesters. Quarantine Support Grants were also offered to international students returning to Canada who were required to quarantine. This totaled $109,000 and $607,300 respectively but is not included in this table.

As an international student, I have a lot of anxiety about my tuition because of rising exchange rates. Receiving scholarships from the U of A has allowed me to free my mind from this anxiety and direct more of my attention towards my education, studying and being involved in the campus community.

Ann, Faculty of ALES | Cairo

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4 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.
### TABLE 4: ALLOCATION OF FUNDS TO INTERNATIONAL UNDERGRADUATE STUDENTS

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Scholarship</td>
<td>1,164</td>
<td>1,483</td>
<td>1,650</td>
<td>↑</td>
<td>$5,361,396</td>
<td>$6,087,377</td>
<td>$7,622,060</td>
<td>↑</td>
</tr>
<tr>
<td>Bursary</td>
<td>70</td>
<td>130</td>
<td>95</td>
<td>↓</td>
<td>$783,644</td>
<td>$1,550,405</td>
<td>$1,557,124</td>
<td>↑</td>
</tr>
<tr>
<td>Repayable Emergency Loan&lt;sup&gt;5&lt;/sup&gt;</td>
<td>23</td>
<td>13</td>
<td>14</td>
<td>↑</td>
<td>$53,301</td>
<td>$17,450</td>
<td>$25,425</td>
<td>↑</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>1,257</td>
<td>1,626</td>
<td>1,759</td>
<td>↑</td>
<td>$6,198,341</td>
<td>$7,655,232</td>
<td>$9,204,609</td>
<td>↑</td>
</tr>
</tbody>
</table>

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.

### DOMESTIC UNDERGRADUATE STUDENTS

The University continues to prioritize domestic students and the changing demographic of students. Through an increase in bursary annual maximums, fewer domestic undergraduate students had an unfunded shortfall. In addition, changes to the emergency loan program and its administration helped to minimize access barriers and increase ease of access to emergency funding (i.e. the elimination of interviews).

In 2021/22, there was a 24.3% ($1.6M) increase in government funded scholarships. This increase in spending is attributed to centralizing selection of undergraduate merit-based supports. With a centralized application, we were able to identify and reach more students and evaluate them for government funded scholarships.

Bursaries saw a 30.9% increase ($2,005,397). This is the second year in a row that there was a six-figure increase in bursary funding (in 2021/21, there was an increase of 17.1% or $947,906). There was increased spending on bursaries because of the increase in allocation to need-based programs from the tuition offset revenue.

### TABLE 5: ALLOCATION OF FUNDS TO DOMESTIC UNDERGRADUATE STUDENTS

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Scholarship</td>
<td>7,580</td>
<td>7,469</td>
<td>8,861</td>
<td>↑</td>
<td>$20,268,739</td>
<td>$20,228,933</td>
<td>$22,489,276</td>
<td>↑</td>
</tr>
<tr>
<td>Bursary</td>
<td>886</td>
<td>739</td>
<td>886</td>
<td>↑</td>
<td>$5,540,619</td>
<td>$6,488,525</td>
<td>$8,493,922</td>
<td>↑</td>
</tr>
<tr>
<td>Repayable Emergency Loan&lt;sup&gt;5&lt;/sup&gt;</td>
<td>160</td>
<td>93</td>
<td>202</td>
<td>↑</td>
<td>$270,135</td>
<td>$148,730</td>
<td>$420,982</td>
<td>↑</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>8,626</td>
<td>8,301</td>
<td>9,949</td>
<td>↑</td>
<td>$26,079,493</td>
<td>$26,866,189</td>
<td>$31,404,180</td>
<td>↑</td>
</tr>
</tbody>
</table>

Source: Office of the Registrar

<sup>5</sup> Repayable emergency loans are a resource for international students facing emergent need, and like loans issued to domestic students, provide SFS with the opportunity to advise if non-repayable need-based support (such as bursaries) is a consideration. Of the 14 international undergraduate students who received emergency loans, 57% (8 students) also received bursary funding.
**INDIGENOUS UNDERGRADUATE FINANCIAL SUPPORT**

Funding issued to FNMI students is included in domestic totals. FNMI students continue to be a target demographic for financial support.

According to the 2021/22 Annual Report on Undergraduate Enrolment, the university has 1,519 self-declared Indigenous students. Of these 1,519 students, 70% (1,063 students) are currently receiving financial support (not including third-party/First Nations, Métis, or Inuit sponsorship). This is a 5% increase compared to the prior year (174 more students).

In 2021/22, overall spending on Indigenous students from RO administered funding sources increased by 36% ($1,086,570), which is largely attributed to an increase in bursary spending. Bursary spending increased by 119.3% ($963,481). An increase in tuition offset revenue provided additional bursary funding to Indigenous students. This was facilitated through increases in annual maximums but also with increased funding specifically intended for Indigenous bursary applicants.

Total tuition offset spent on Indigenous students was $853,250, which is 26.3% of total domestic undergraduate tuition offset spending. More Indigenous students received some type of financial support than in previous years, and for the first time the proportion of funding to Indigenous students outpaced enrolment growth.

Indigenous enrolment increased by 11.6% while the number of Indigenous students receiving financial supports only increased by 25.4%. This is the result of increased awareness of the bursary program and proactive outreach/advising.

As an Indigenous student from rural and isolated Grande Cache/Aseniwuche Winewak Nation, moving to Edmonton/Amiskwaciwâskahikan for my education was an enormous cultural and social change. Receiving the Transition Year Program Scholarship and the Supplemental Bursary allowed me to afford my living expenses and return home throughout the year, making my transition to urban living and studying manageable and enjoyable.

*Marc Jr., Faculty of Arts | Grande Cache*

**TABLE 6: RO ADMINISTERED SUPPORT TO INDIGENOUS STUDENTS, 2021/22**

<table>
<thead>
<tr>
<th>Funding Source</th>
<th>Number of Students</th>
<th>Total Indigenous Financial Support</th>
<th>Total Undergraduate Financial Support</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scholarship</td>
<td>553</td>
<td>$2,209,594</td>
<td>$30,111,336</td>
<td>7.3%</td>
</tr>
<tr>
<td>Bursary</td>
<td>223</td>
<td>$1,771,256</td>
<td>$10,051,046</td>
<td>17.6%</td>
</tr>
<tr>
<td>Repayable Emergency Loan</td>
<td>64</td>
<td>$126,201</td>
<td>$446,407</td>
<td>28.3%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>840</strong></td>
<td><strong>$4,107,051</strong></td>
<td><strong>$40,608,789</strong></td>
<td><strong>10.0%</strong></td>
</tr>
</tbody>
</table>

Source: Office of the Registrar

Note: Total recipients includes double counting.

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

The RO only focuses on need-based supports for graduate students. The majority of graduate student funding (including merit-based funding) is administered by other units and faculties. The Faculty of Graduate Studies and Research (FGSR) issued $29M in merit-based funding in 2021/22.6

$3.1M in RO administered graduate financial support was issued to graduate students in 2021/22. This is an 11.5% ($316,801) increase in RO administered graduate financial support compared to last year.

The increase is the result of additional need-based funding issued to graduate students from the tuition offsets. The number of graduate students accessing bursaries increased by 8.1% (20 students) with bursary spending increasing by 23.1% ($515,431). Quarantine Support Grants were also offered to international students returning to Canada who were required to quarantine. 565 international graduate students received $311,100 in Quarantine Support Grant funding.

Domestic graduate students account for 60.7% of the graduate study body7 and received $1,086,549 in need-based financial supports. This accounts for 37.8% of total graduate need-based supports. International graduate students currently account for 39.3%8 of graduate enrolment and received $1,788,559 (62.2% of total) in need-based financial supports.

We recognize that graduate students fund their education differently than undergraduate students. The RO continues to work with FGSR to ensure need-based supports align with the unique needs of graduate students.

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

<table>
<thead>
<tr>
<th>Funding Source</th>
<th>2019/20</th>
<th>2020/21</th>
<th>2021/22</th>
<th>Trend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scholarship</td>
<td>130</td>
<td>68</td>
<td>72</td>
<td>↑</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>$464,174</td>
<td>$282,563</td>
<td>$208,141</td>
<td>↓</td>
</tr>
<tr>
<td>Bursary</td>
<td>224</td>
<td>246</td>
<td>266</td>
<td>↑</td>
</tr>
<tr>
<td></td>
<td>$1,285,948</td>
<td>$2,227,068</td>
<td>$2,742,499</td>
<td>↑</td>
</tr>
<tr>
<td>Repayable Emergency Loan</td>
<td>93</td>
<td>116</td>
<td>67</td>
<td>↓</td>
</tr>
<tr>
<td></td>
<td>$210,758</td>
<td>$231,617</td>
<td>$132,609</td>
<td>↓</td>
</tr>
<tr>
<td>Total</td>
<td>447</td>
<td>430</td>
<td>405</td>
<td>↓</td>
</tr>
<tr>
<td></td>
<td>$1,960,880</td>
<td>$2,741,248</td>
<td>$3,083,249</td>
<td>↑</td>
</tr>
</tbody>
</table>

Source: Office of the Registrar

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6 Details of graduate merit-based funding are not available in this report as this report only focuses on RO administered funds.
7 Graduate Student Enrolment Report 2021/22
8 Graduate Student Enrolment Report 2021/22
WHAT’S NEXT

EQUITY, DIVERSITY AND INCLUSIVITY AND INDIGENOUS INITIATIVES

The RO has been working to develop new programs and processes that align the administration of financial supports with the Equity, Diversity and Inclusion (EDI) and Indigenous Initiatives (II) of the university.

Critical New Initiatives

Access Awards

In 2021/22, the RO developed new access award programs to support 50 incoming students facing financial barriers. The program won the ARUCC (Association of Registrars of the Universities and Colleges of Canada) Award for Excellence in Diversity and Inclusion.

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 will come from domestic tuition offset revenue and will be included in the 2022/23 SFS Annual Report.

Exceptional Tuition Increases

This is new revenue to support access to the U of A given the increases in tuition costs.

The RO worked with each program to establish financial supports for unique program requirements.

Information will be included in the 2022/23 SFS Annual Report.

Hybrid Funding

The university is committing $400,000 to hybrid awards for 2022/23. This is net new funding and represents a 40% increase to the existing suite of hybrid awards (that are all donor funded).

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.

This is a new category of funding that will be included in the 2022/23 SFS Annual Report.

EDI Student Survey

On the most recent continuing 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 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 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. These results suggest that financial stress factors are more widespread within the general student population, and this information will be used as a guide to ensure the financial support programs meet needs of students.
Scholarship applicant information 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**

<table>
<thead>
<tr>
<th>Demographic</th>
<th>EDI Student Survey Result</th>
<th>Scholarship Applicant Result (% of total applicants)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Students with dependents</td>
<td>8.5%</td>
<td>2.5%</td>
</tr>
<tr>
<td>First generation students</td>
<td>34.4%</td>
<td>15%</td>
</tr>
<tr>
<td>Identify as FNMI</td>
<td>4.9%</td>
<td>3.5%</td>
</tr>
<tr>
<td>Identify as gender non-conforming</td>
<td>4.2%</td>
<td>1%</td>
</tr>
<tr>
<td>Working for 15 hours or more</td>
<td>21.2%</td>
<td>17%</td>
</tr>
</tbody>
</table>

**Service Excellence Initiatives**

Our work is reflected in the university's shared strategic goals, including encouraging continuous improvement in administrative, governance, planning and stewardship systems, procedures and policies. Through the Service Excellence Transformation Initiative, we are creating more efficient and effective ways to manage the administration of financial support and are making decisions that are well-aligned with policy. We are also collaborating closely with the Student Service Centre to enhance the student experience and service culture, such as providing more robust financial literacy programs and services.

**International Supplementary Bursary Application**

This was created to streamline the application and assessment processes.

This is the result of consolidating previously held bursary programs in UAI.

**SFS Award Modernization Project**

This project was created to improve the student experience and create administrative efficiencies.

The project began in April 2022 and the new system is expected to launch in January 2023.

**Work Integrated Learning (WIL) and Financial Literacy**

As part of the new Access Awards, the RO will be developing wrap around services to support these students. This model is expected to be used in the future for other key demographics.

SFS and the Student Service Centre are working to provide more robust financial literacy programs and services for students.

We will evaluate how WIL can be incorporated into financial support packages for students beginning in Fall 2022.
For more information, contact:

Office of the Registrar
780.492.3113
ualberta.ca/registrar
Overview

Student Financial Support 2021/22

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

Date:
SEPTEMBER 2022
The Undergraduate Student Financial Support Overview provides a snapshot of student funding for the 2021/22 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.

## UNDERGRADUATE FINANCIAL SUPPORTS — UNIVERSITY OF ALBERTA

<table>
<thead>
<tr>
<th>Funding Source</th>
<th>Need-based</th>
<th>Merit-based</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donor</td>
<td>$2,828,495</td>
<td>$9,657,540</td>
<td>$12,486,035</td>
</tr>
<tr>
<td>Government</td>
<td>$138,975,247</td>
<td>$8,514,000</td>
<td>$147,489,247</td>
</tr>
<tr>
<td>University Operating</td>
<td>$3,012,955</td>
<td>$5,747,489</td>
<td>$8,760,443</td>
</tr>
<tr>
<td>University Tuition Offsets</td>
<td>$4,656,003</td>
<td>$6,192,307</td>
<td>$10,848,310</td>
</tr>
<tr>
<td>External Funding</td>
<td>$1,070,584</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$149,472,699</strong></td>
<td><strong>$30,111,336</strong></td>
<td><strong>$180,654,619</strong></td>
</tr>
</tbody>
</table>

## UNDERGRADUATE FINANCIAL SUPPORTS — RO ADMINISTERED

- **$40.6M**
  - 30.7% = $12.5M Donor
  - 21.0% = $8.5M Government
  - 20.5% = $8.8M University Operating Funds
  - 26.7% = $10.8M University Tuition Offsets¹

I was proud to receive an entrance scholarship. It reminded me that my hard work was worth it. It drives me to continue working hard not only in my studies, but in all aspects of life.

Lukian, Faculty of Kinesiology, Sport and Recreation

As a student from rural Alberta, I had to relocate to attend school. The financial support from the scholarships I received eased the burden of rising living expenses so I can focus on my studies.

Amanda, Agriculture, Life & Environmental Sciences

¹ Tuition offsets include revenue from both domestic and international tuition. 92.9 per cent of revenue collected through the university tuition offset was spent.
ABOUT OUR UNDERGRADUATE FINANCIAL SUPPORT RECIPIENTS

20,975 = 60%
TOTAL RECIPIENTS OF TOTAL UNDERGRADUATE ENROLMENT

31%
OF UNDERGRADUATE STUDENTS WHO RECEIVED NEED-BASED SUPPORT ALSO RECEIVED MERIT-BASED SUPPORT

-41.9%
DECREASE IN THE NUMBER OF STUDENTS WITH AN UNFUNDED SHORTFALL COMPARED TO THE PREVIOUS YEAR

0.4%
OF TOTAL UNDERGRADUATE ENROLMENT HAD AN UNFUNDED FINANCIAL SHORTFALL IN 2021/22

DOMESTIC UNDERGRADUATE STUDENTS
19,244
TOTAL RECIPIENTS
64%
OF TOTAL DOMESTIC UNDERGRADUATE ENROLMENT
$170.4M
RECEIVED IN FUNDING
84%
OF DOMESTIC FUNDING WENT TO ALBERTAN STUDENTS

INDIGENOUS UNDERGRADUATE STUDENTS
1,063
TOTAL RECIPIENTS
70%
OF TOTAL INDIGENOUS UNDERGRADUATE ENROLMENT
$10.5M
RECEIVED IN FUNDING
36%
INCREASE IN RO ADMINISTERED FUNDING TO FNMI STUDENTS

INTERNATIONAL UNDERGRADUATE STUDENTS
1,731
TOTAL RECIPIENTS
35%
OF TOTAL INTERNATIONAL UNDERGRADUATE ENROLMENT
$9.2M
RECEIVED IN FUNDING
74
COUNTRIES REPRESENTED BY STUDENTS RECEIVING FUNDING
For more information, contact:
Office of the Registrar
780.492.3113
ualberta.ca/registrar
## Agenda Title
Early consultation on development of the University Strategic Plan (USP)

<table>
<thead>
<tr>
<th>Item</th>
<th>Proposed by</th>
<th>Presenter</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Verna Yiu, Interim Provost &amp; Vice-President (Academic)</td>
<td>Verna Yiu, Interim Provost &amp; Vice-President (Academic) Logan Mardhani-Bayne, Strategic Development Manager, Office of the Provost &amp; Vice-President (Academic)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Details</th>
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<tbody>
<tr>
<td>Office of Administrative Responsibility</td>
</tr>
<tr>
<td>The Purpose of the Proposal is (please be specific)</td>
</tr>
<tr>
<td>Executive Summary (outline the specific item – and remember your audience)</td>
</tr>
<tr>
<td>1. When you think about the University of Alberta and what it does particularly well, what achievement or practice makes you most proud?</td>
</tr>
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<td>2. Conversely, where does the University most need to improve?</td>
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<tr>
<td>3. What do you think are the main economic and socio-political changes that will be affecting higher education, society, and the environment over the next ten to fifteen years?</td>
</tr>
<tr>
<td>4. What’s the greatest thing you could imagine the university accomplishing over the next 20 years?</td>
</tr>
</tbody>
</table>
5. How does the University of Alberta most directly meet the needs of the people and the world it serves?
   a. What measures (including investments in people, resources, and programs) could the university take to improve our university? How would taking these measures translate into a better university, a better Alberta, and stronger relationships with Indigenous nations?

In the second phase of consultation, beginning in early 2023, the steering committee will release a "What We Heard" document, launch a survey to solicit more focused input on the key themes, and review consultation findings with governance committees. A draft strategic plan will be submitted for consideration by GFC and then the Board of Governors in spring 2023.

Institutional risk implications
The USP addresses risks associated with the university failing to update its institutional objectives in light of the current environment (institutional, provincial, and global), and will enable the university to evaluate and manage institutional risk in light of current and relevant goals.

Supplementary Notes and context
<This section is for use by University Governance only to outline governance process.>

### Engagement and Routing (Include proposed plan)

<table>
<thead>
<tr>
<th>Consultation and Stakeholder Participation</th>
<th>The first phase of consultation (November-December 2022) includes the following engagements:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Community town hall – November 2</td>
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<tr>
<td></td>
<td>• Roundtable discussions</td>
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<td>o One per faculty (x16)</td>
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<td></td>
<td>o ATS</td>
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<td></td>
<td>o Graduate students and Post-doctoral fellows</td>
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<td>o Undergraduate students</td>
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<td>o Student services and student experience</td>
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<td>o Library and Museum Services</td>
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<td>o US&amp;F staff</td>
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<td></td>
<td>o F&amp;O staff</td>
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<td>o ER staff</td>
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<td>• Students’ Council</td>
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<td>• Graduate Students’ Council</td>
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<td>• Indigenous Advisory Council</td>
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<td>• Provosts’ Advisory Committee of Chairs</td>
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<td>• University Research Policy Committee</td>
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<td>• University Senate</td>
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<td>• Alumni Council</td>
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<td>• Deans’ Council</td>
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<td>• Faculty of Medicine and Dentistry Deans’ Advisory Board</td>
</tr>
</tbody>
</table>
For the meeting of November 3, 2022

Item No. 8

- Alberta School of Business Advisory Council
  In addition, external consultants will conduct approximately 30 interviews with external stakeholders.

Strategic Alignment

<table>
<thead>
<tr>
<th>Alignment with For the Public Good</th>
<th>The new university strategic plan (USP) will be the successor to For the Public Good.</th>
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<tbody>
<tr>
<td>Alignment with Core Risk Area</td>
<td>Please note below the specific institutional risk(s) this proposal is addressing.</td>
</tr>
<tr>
<td>☒ Enrolment Management</td>
<td>☒ Relationship with Stakeholders</td>
</tr>
<tr>
<td>☒ Faculty and Staff</td>
<td>☒ Reputation</td>
</tr>
<tr>
<td>☒ Funding and Resource Management</td>
<td>☒ Research Enterprise</td>
</tr>
<tr>
<td>☒ IT Services, Software and Hardware</td>
<td>☒ Safety</td>
</tr>
<tr>
<td>☒ Leadership and Change</td>
<td>☒ Student Success</td>
</tr>
<tr>
<td>☒ Physical Infrastructure</td>
<td></td>
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</tbody>
</table>

Legislative Compliance and jurisdiction

- Council on Student Affairs Terms of Reference

Attachments (each to be numbered 1 - <>)

1. Environmental Scan (page(s) 1 - 16)

*Prepared by:* Logan Mardhani-Bayne, Strategic Development Manager, Office of the Provost & Vice-President (Academic), lmardhan@ualberta.ca
Government Funding

Government Funding Has Been Flat or Falling for Over a Decade

The period from about 1999 to 2008 was the only period since the 1970s during which government funding to institutions rose at the same rate as funding to the health care sector. In Alberta, the rate of increase in funding in the final years of the Klein government and the early years of the Stelmach government was extraordinarily rapid. However, growth in government funding to institutions ended around the time of the Great Financial Crisis in 2008.

Though the Knowledge Infrastructure Program provided an additional funding boost from 2009-11, spending was relatively consistent in real terms until the late 2010s. It was at this point that the UCP government began reducing funding to bring Alberta more closely in line with the rest of the country, a job it had mostly achieved by 2020-21.

Another key point: around the world and across Canada, governments are putting more fetters on institutions and the way they spend. Accountability for provincial dollars is increasing at the same time as transfers are decreasing. This seems unlikely to change in the near future regardless of which party is in power.
The Changing Dynamics of Fiscal Federalism Will Impact Post-Secondary Financing

The Parliamentary Budget Office monitors the financial sustainability of government expenditure at both the federal and provincial levels. The most recent report suggests that while provincial governments will struggle with the consequences of the demographic transition (see trend 3), federal finances are set for a dramatic improvement over the next few years, simply because its income and expenditure profile is less tied to demographic changes than are those of provinces. Given that the provincial government funds post-secondary operations while the federal government funds research and (to an extent) infrastructure, this may herald big increases in federal transfers.

However, if transfers are not an option, this imbalance may also lead to a very big change in the funding structure of Canadian universities, one in which research plays an ever-greater role simply because that’s the only tool the better-off level of government has at its disposal.

Figure 3: Government net debt relative to GDP
For the past few decades, many of the biggest developments in higher education have been about moving away from education being a solid-block full-time commitment at a single institution, with the classroom/laboratory as the physical locus of knowledge exchange. Part-time studies, credit transfer and more recently micro-credentials have all been chipping away at the notion that higher education requires full-time sequential attendance at a single institution. At the same time, work-integrated learning (WIL) and remote/online education have moved the centre away from the classroom somewhat.

There is no sign that any of these trends are slackening. However, neither is there much sign that any of them are likely to upend traditional undergraduate studies any time soon. Remote/online education in theory makes it possible for institutions to deliver education anywhere in the world, but few international students seem inclined to use it outside of emergencies (in part because institutions seem reluctant to reduce prices for this delivery model). Micro-credentials have the potential to change the face of life-long learning and in particular Master’s Degrees, but the government’s inaction on creating strong supportive policy frameworks to support them is slowing their uptake.

The clearest opening for new delivery models is in online professional programs and – just possibly – older students in Bachelor’s programs (roughly 20% of undergraduate students preferred the online COVID teaching environment, a figure which skewed towards older and part-time students). But doing well in this space requires significant investments in IT infrastructure, user experience and instructional design.
Technological Development

Over the past few decades, the main focus of technological change has been around computing power and programming algorithms. While this seems certain to continue to some degree, owing particularly to machine learning and artificial intelligence, the innovation pendulum seems to be swinging back towards industries involving real atoms rather than just bits.

The reason for this is the energy sector. The introduction of renewables at scale is starting to induce significant declines in the price of energy. This is combined with improvements in battery technology which not only reinforce the renewables revolution, but also allow the porting of energy into mobile devices such as cars, e-bikes, robots, etc. Thus, changes in the energy sector may also herald significant shifts in manufacturing as well.

There will be worldwide implications to the electrification of energy grids which will likely drive major shifts in employment; in Alberta specifically there will almost certainly be continued dislocations as oil and gas may struggle to compete against these new energy entrants. Already the International Energy Agency has declared not just “peak oil,” but also “peak gas.”

Another area of significant innovation is health care. New areas of research such as gene synthesis, gene therapy and brain-computer interfaces may not end up having a great deal of consumer impact in the next decade but R&D investments in these areas seem likely to increase significantly in the next few years.

The could all change life at the University of Alberta in several ways. Technology could certainly continue to change course delivery and pedagogy. Government and private sector research priorities may change. And changes in the structure of the economy may change student demand across fields of study. No one can predict any of this with certainty but keeping various possibilities in mind is an important part of any planning exercise.
Demographic Change

Labour Market Pressures Will Be With Us for a Long Time to Come

Though much commentary on labour shortages has blamed recent tight markets on COVID and the so-called “Great Resignation,” it is in fact the product of a much larger and longer-term process. Simply put, the aging of the population means that the ratio of Canadians of working age to the total population is going down rapidly and will continue to fall through to the mid-2030s before stabilizing; in Alberta, the trend line is similar, but the effect will be less pronounced given its somewhat younger population base. The effect of this demographic change will be to create permanent labour shortages across Canada similar to those Alberta experienced during the oil boom, and to push up wages, especially for lower-skilled workers. This will influence post-secondary enrolment, as high-wages for low-skilled workers increases the opportunity-cost of attending post-secondary education. The effect will be to put steady downward pressure on enrolments unless universities find better ways to help students mix work and study. It will also probably exert downward pressure on the length of degree and non-degree programs (including greater uptake of micro-credentialling).

A final consideration here is that tight labour markets will undoubtedly make it more challenging for the university itself to hire and retain staff.

Figure 4: Ratio of over-65s to 25–64-year-olds, Canada, 2000-2050 (projections)
A Changing Alberta: Growing Youth Population, Growing Jobs

While one frequently sees stories about the consequences of an aging population, it is important to understand that Alberta is quite different from the rest of Canada demographically. According to the latest Statistics Canada census (2021):

- The Albertan population is younger (38.4 years old on average versus the national average of 41.6).
- The proportion of 0–14-year-olds is higher at 24.9% (versus a national average of 20.9%).
- The number of 18-year-olds is projected to consistently increase in the province until at least 2033.

Indeed, while the country is looking at an increase in the number of 18-year-olds over the next five years, in Alberta the numbers of young people are projected to continue rising well into the 2030s (see Figure 5).

In terms of industry, Alberta has continued, like other parts of the world, to move away from goods production over the past twenty years. While most jobs categories have seen an increase in job creation since the turn of the century, 85% of total new jobs arose in the service sector, and the proportion of all jobs in the service sector rose from 74% to 77%. As Figure 6 shows, two of the top three fastest growing occupations are primarily served by the university sector.

Figure 5: Projected number (in 10,000s) of 18-year-olds in Alberta, 2022-2033

Figure 6: Change in Total Employment by Occupation, Alberta, September 2000 to September 2022
Equity, Diversity, and Inclusion

Post-Secondary Institutes are Increasingly Committing to Equity, Diversity, Inclusion, and Decolonization in their Plans

Post-secondary institutions are increasingly articulating commitments that reflect shifts in the societies they serve. In a recent scan of over 50 institutional strategic plans from across Canada, commitments to improving EDI on campus were cited in 80% of the plans, either as a main pillar or category or as a secondary goal/objective in support of a main pillar or categories. EDI was the second-most frequently included strategic priority in our scan.

University strategic plans are speaking to instances of societal evolution in matters of Indigenization and decolonization. Since the Truth and Reconciliation Commission (TRC) published its Calls to Action in 2015, Canadian post-secondary institutions have responded by including language in their strategic plans pledging to take tangible steps or to more broadly work towards Indigenization and decolonization at the institution. Two-thirds of the strategic plans reviewed now include references to Indigenization and decolonization, a marked increase compared to the pre-TRC era.

For the University of Alberta, these two commitments have specific implications. Nearly half of U of A applicants come from the City of Edmonton, and among youth in Edmonton nearly half (48.3%) are either Indigenous or belong to a visible minority group. As the university serves an increasingly diverse student body, diverse community, and as it employs an increasingly diverse staff, past educational and work structures and conditions may not meet the needs of today’s populations in their pursuit to obtain a post-secondary education or to contribute to the University's ambitions.
Academia Moves South and East

Academia’s Global Centre of Gravity is Shifting East and South

The period between 1998 and 2013 was the fastest period of higher education enrolment growth in world history – a rate of roughly 8% per year. But since then, growth has slowed to about 2% per year, mainly because the global youth population has started to decline. While it will recover slightly in the 2030s, future growth in university enrolments is mostly going to come from increasing participation rates. In the global north, where higher education is already near-universal, there is little room for growth of this kind. This means that most of the growth will continue to occur in Asia and Africa – through to 2048, about 93% of all global growth is likely to come from these two areas.

The implication for universities in the developed world is not just that growth in international student numbers is more likely to come from these areas – it is likely that the “rising” universities of the first half of the twenty-first century are also likely to come from these areas as well. To the extent that international collaboration in research is important to any North American university, this evidence suggests that the search for the new research stars should be focused on Asia and Africa.

Figure 8: The shifting balance of global higher education (projected enrolments, 2008-2048, in millions)
The Poly-Crisis

Interlocking Global Crises

Global events and catastrophes of the last few years have included pandemics, civil crises, inter-state violence or extreme climate-related events (e.g., historic levels of flooding in Pakistan or Germany, historic droughts in China and Europe). On balance, these seem likely to escalate and exacerbate one another. In particular, the combination of climate-based and conflict-based interruptions of global food exchange patterns seems likely to cause continued increases in food prices, which themselves are considered the leading indicator for increased civil unrest in parts of the developing world. Add to this the prospect of drying aquifers in various parts of the world, increasingly volatile weather patterns globally, and the potential for the creation of large-scale climate refugee populations, and it is easy to see why the next couple of decades are likelier to see higher degrees of economic and social volatility. These are unlikely to affect Canadian higher education institutions directly (except perhaps in the way that Keyano College was affected in the fires of 2016) but coping with these crises will put additional strains both on government funding and on the attention span governments have to deal with important but non-urgent files like higher education. It may also affect the free flow of students between countries, including to and from Canada. In short, increasing volatility is simply a headwind that higher education will need to cope with.
Research and Innovation

Since the Second World War, universities’ roles as centres of discovery has taken ever-increasing importance. Consequently, institutional prestige, which is today mostly expressed in the form of international rankings, has also become increasingly connected to perceptions and measurements of research excellence.

The figures below show that the University of Alberta is consistently ranked around 100th in the world by ranking systems which mostly focus on research output. They also show that in general, University of Alberta does better on measures of output rather than it does on measures of impact.

Until the 1990s, the university’s new role was typically expressed in terms of fueling basic research. Since the 1990s, however, universities have been expected to take on an increasingly direct role in economic development through commercialization activities, among other things. More recently, universities have also strongly emphasized solving problems of local and global societal importance, often articulated as a commitment to acting in the service of the United Nations’ Sustainable Development Goals. A new ranking designed to measure this puts Alberta 11th in the world, though it should be noted that this ranking is boycotted by many research-intensive institutions.

Table 1: University of Alberta Performance, Whole Institution and by Broad Scientific Field, CWTS Leiden Rankings 2022

<table>
<thead>
<tr>
<th>Discipline</th>
<th>ALL DISCIPLINES</th>
<th>BIOMEDICAL &amp; HEALTH</th>
<th>LIFE &amp; EARTH SCIENCE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>PUBLICATIONS</td>
<td>IMPACT (TOP 5%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3rd in Canada</td>
<td>59th Globally</td>
<td>4th in Canada 89th Globally</td>
</tr>
<tr>
<td></td>
<td>10th in Canada</td>
<td>379th Globally</td>
<td>7th in Canada 288th Globally</td>
</tr>
<tr>
<td></td>
<td>3rd in Canada</td>
<td>78th Globally</td>
<td>2nd in Canada 78th Globally</td>
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<tr>
<td></td>
<td>13th in Canada</td>
<td>328th Globally</td>
<td>96th in Canada 457th Globally</td>
</tr>
</tbody>
</table>

Figure 9: University of Alberta Performance on Major Global League Tables, 2012-2022
Research and Innovation

One of the main constraints on research output is money. It is no secret that research-intensive institutions are expensive to operate. The top institutions in the world spend billions of dollars on research every year. Figure 10 shows the research expenditures of the University of Alberta compared with those of top 25 public universities in the world in the Shanghai Rankings (UCSF is excluded on account of being medicine-only). Alberta does reasonably well on this measure compared to many of the top-25 universities, but it remains some distance behind the leaders. Figure 11 shows the change in income from the federal Tri-Councils and the Canada Foundation for Innovation over a 10- and 20-year time horizon (i.e., since 2000-01 and 2010-11) for all U-15 universities. The University of Alberta is about the median performer at both time-scales, but several competitors in Western Canada have done better.

Among the key question for any new University of Alberta strategy is how to increase income, and thus expenditure, on research. Increasingly, lower-ranked institutions seem to be settling on a "steeples of excellence" strategy. This strategy, first pioneered by Stanford over 60 years ago, entails putting focus on a few areas of (preferably interdisciplinary) excellence, in order to increase chances of attracting large funders. The University of Alberta has gone some way in this direction with its five "signature" areas of research. Could it do more?
Student Experience

Undergraduate

Student experience is measured through all the interactions they have with their higher education institutions from application until graduation. Students expect increasingly high levels of engagement and personalization, both in and out of the classroom.

According to the most recent NSSE survey (2020), U of A students place a high value on course choice, consistency between course coverage and examination content, and quality of course instruction. Outside the classroom, U of A students indicated the availability of high-quality study spaces, access to quality personal support services (e.g. counselling), and the opportunity to participate in research with faculty as an undergraduate as being of particularly high value. When benchmarked against its U15 comparators, the U of A performs on par in most areas.

In the 2022 Canadian University Survey Consortium respondents indicated that the top 5 reasons (in order of popularity) they decided to attend university:

- To prepare for a specific career or job
- To get a more fulfilling job than I probably would if I didn’t go
- More likely to get a job with a degree
- Apply learnings to make a positive difference in the community
- Earn money

Universities have tried to provide student experiences that cater to these aspirations by promoting work-integrated learning, service learning, and other forms of experiential learning commonly believed to provide students with workplace marketable skills.

Another recent survey\(^1\) indicated that 77% of AB students reported that they wanted their post-secondary school to help develop soft skills, like creative problem solving, empathy, and emotional intelligence. In the same survey, 76% of AB students wished their post-secondary school had a stronger focus on mental health and well-being.

---

Student Experience

Graduate

According to the most recent poll from the Canadian Graduate and Professional Student Survey (CGPSS), the following were most important to graduate students:

- The opportunity to work or collaborate with other academics or graduate students in other departments or disciplines at the same university
- Collaboration with other academics / graduate students at other research institutions in Canada
- International collaboration

Literature on graduate student experience often also includes discussion on the need for:

- "Alt-ac" career preparation.
- Funding and living affordability
- Mental health and well-being support


Online

A growing segment of students study online. The year before the Covid-19 pandemic, more than 76% of colleges and universities in Canada offered online courses. The proportion has since risen to 92% of institutions that educate 7,500 students or more, and 93% of all universities. The online education landscape is changing. Universities will need to adjust to meet expectations in this area.

In Person/Online Binary Fallacy
- An increasing proportion of on-campus students also take at least one online course.
- Rethinking space to accommodate hybrid learners.
- Changing needs for accessing services.
- Facilities used differently.

Student Success
- Identifying struggling students earlier to promote retention.
- Persistence and retention are a result of learner, provider, and instructional factors.
- Easy, digital access to supports and resources.

Student Expectations
- Expect augmented, virtual, and mixed reality technology.
- Hyper-personalized learning experience.
- Flexible and simplified learning experiences.
Figure Sources

Figure 1: Statistics Canada. Table 37-10-0026-01 Revenue of universities by type of revenues and funds and Table 37-10-0028-01 Revenues of colleges by types of revenues and funds
Figure 2: ibid.
Figure 3: Parliamentary Budget officer, Fiscal Sustainability report 2022
Figure 4: Statistics Canada, Centre for Demography. Statistics Canada Population Projections, M1 (medium) variant.
Figure 5: Statistics Canada Labour Force Survey, 2022
Figure 6: Ibid
Figure 7: Statistics Canada. Table 98-10-0337-01 Visible minority by ethnic or cultural origin: Canada, provinces and territories, census metropolitan areas and census agglomerations with parts
Figure 8: Higher Education Strategy Associates. https://higheredstrategy.com/global-higher-education-to-2050/
Figure 9: https://www.qs.com/rankings/ and https://www.timeshighereducation.com/world-university-rankings and https://www.shanghairanking.com/
Table 1: CWTS Leiden Rankings 2022
Figure 10: Higher Education Strategy Associates Top 200 Global Universities Financial Database
Figure 11: Canadian Association of University Business Officers, Financial Information of Universities and Colleges, various years
Figure 12: NSSE 2020 Consortium Report, U15 xOntario. University of Alberta
Figure 13: Canadian Graduate and Professional Student Survey 2022 Summary Report, All students
Thank you.

Please reach out any time if you have any further reflections or questions.