

# Alberta Access Planning Framework

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## *Setting the Direction*

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Compendium Document

June 2008



## ***Letter from the Minister***

I am pleased to present the first Alberta Access Planning Framework (AAPF). The AAPF is a key component of the *Roles and Mandates Policy Framework for Alberta's Publicly Funded Advanced Education System* and provides important context to ensure that we are responding to the needs of learners, society, and the economy. The AAPF provides key information for decision-making concerning access, program expansion, and capital requests.

Aligning the system to satisfy learner, social, and economic demand requires identifying access and demand pressures, both provincially and regionally. Organized thematically into five profiles, the AAPF includes data on important indicators relating to advanced education, including population demographics, high school data, post-secondary data, system capacity, and labour force data. Regional data is also included, providing additional information for institutions as they determine the needs of learners within their geographic service regions.

The AAPF is a planning document that is intended to facilitate system coordination, provide a strong foundation to support decision-making, and allow for an informed approach to system planning. The information included in the AAPF is essential for institutions as they prepare their Institutional Access Plans (IAPs) and business plans. Through collaboration and effective planning, system access priorities can be effectively addressed and partner needs can be met.

I trust that the Alberta Access Planning Framework will provide valuable information for system partners. The AAPF will serve as an essential tool as we collectively work to achieve our vision of leading the world in inspiring and supporting lifelong learning for all Albertans, and prospering through innovation.



Doug Horner  
Minister of Advanced Education and Technology

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## Table of Contents

	<i>Letter from the Minister</i> .....	<i>i</i>
	<i>Background: Policy Context</i> .....	<i>1</i>
	<i>Policy Outcomes</i> .....	<i>3</i>
	<i>Key Policy Directions</i> .....	<i>5</i>
	<i>Timelines and Next Steps</i> .....	<i>7</i>
<i>Appendices</i>	<i>Appendix A Planning and Priority Setting Process</i> .....	<i>8</i>
	<i>Appendix B Institutional Access Plans (IAPs) – Key Components</i> .....	<i>12</i>
	<i>Appendix C Capital Projects – Key Considerations</i> .....	<i>14</i>
	<i>Appendix D System Planning – Key Considerations</i> .....	<i>15</i>

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## Background: Policy Context

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### Purpose

The purpose of the *Alberta Access Planning Framework* (AAPF) and this compendium document (“Setting the Direction”) is to provide the context and broad direction to support planning within the province’s post-secondary system. This will support the aim of broadening access and ensure that Alberta’s post-secondary providers can respond to the needs of learners, the economy, and society. Together, the AAPF and “Setting the Direction” provide a broad context of the key strategic directions for access (including funding principles), as well as demographic and economic drivers that impact access and participation in post-secondary education. Appendix A provides a brief overview of the planning and priority setting process and its key components, as set out in the *Roles and Mandates Policy Framework*.<sup>1</sup>

The AAPF’s primary focus is on provincial-level factors; however, it will be supported by the development of Regional Profiles (providing regional-level context) and Institutional Access Plans (providing institutional-level context).

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### Roles and Mandates Policy Framework

In support of the implementation of the Campus Alberta concept, a Roles and Mandates Policy Framework was developed in response to a recommendation in *A Learning Alberta* to more clearly define the roles and responsibilities of Alberta’s advanced education system partners. To accomplish this, the Minister of Advanced Education and Technology initiated stakeholder discussions in early 2007 to support the development of a policy framework for Alberta’s publicly funded advanced education system.

The *Roles and Mandates Policy Framework* was approved and released in November 2007 and serves as the foundation for the ongoing evolution of Alberta’s advanced education system. Subsequently, the Minister established four working groups with representation from the institutional stakeholder community to support the framework’s implementation: Funding and Accountability, Planning and Access, Community Adult Learning, and Research and Innovation. Their work was completed in December 2007.

The framework ensures strategic long-term planning for advanced education in Alberta by building a more resilient and responsive system that aligns supply and capacity to the demands of learners, society, and the economy. Specifically, the Framework:

- Ensures that the system is responsive and appropriately aligned to meet the needs of learners, the economy, and society; foster an increased ability to harness our people resources; and effectively leverage system capacity and strategically invest in research and innovation;
- Serves as the basis for the ongoing evolution of the advanced education system and provides a foundation to inform decisions on future system direction;
- Outlines an *Alberta Access Planning Framework* that articulates a more strategic, open, and transparent approach to system planning, as well as a vehicle to communicate system priorities and direction; and
- Identifies the need to establish a Minister’s Strategy Committee on Access as a key communications

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<sup>1</sup> Available on-line at <http://www.advancededucation.gov.ab.ca/reading/policy/roleframework/>

vehicle to facilitate the implementation of the *Roles and Mandates Policy Framework*.

## Alberta Access Planning Framework

The *Roles and Mandates Policy Framework* identified the *Alberta Access Planning Framework* (AAPF) as a key planning instrument, designed to provide the context to support access planning within the province's advanced education system. Enrolment levels within Alberta's publicly funded post-secondary system are a reflection of various factors, including demographics, high school transition rates, economic performance, educational attainment levels, and migration.

The AAPF provides provincial level data around key variables and identifies priorities for access and expansion at a regional and program band level. It is intended to provide a foundation for more informed institutional planning and system direction-setting.

The AAPF will also help provide a context for Enrolment Planning Envelope (EPE) funding decisions, capital expansion requests, and program expansion approvals, as part of an ongoing iterative dialogue between the department and institutional representatives.

Key features of the AAPF process include:

- *Regional Profiles System*: a planning tool to augment the AAPF and ensure more rigorous use of demand and planning information, as well as facilitate sharing of information. Ultimately, each institution will have access to regional specific information to enable them to be more responsive to needs within their local communities.
- *Institutional Access Plans (IAPs)*: Institutional-level plans that will reflect priorities identified in the AAPF and be consistent with each institution's approved mandate. The IAPs will address expansion, new programs, reallocations to other programs, and other access-related strategies in response to the AAPF (e.g. transitions, immigrant bridging, etc.). Each institution's IAP will be provided to the department annually to identify strategic access objectives and strategies in response to the AAPF, and will become an integral part of the institution's Business Plan submission. Guidelines for compiling Institutional Access Plans will be developed collaboratively alongside the Regional Profiles System (see Appendix B for draft IAP guidelines).
- *Regional Access Advisory Councils*: Comprised of Comprehensive Community Institutions (CCIs) and community learning partners, Councils would serve as the basis for facilitating the identification of comprehensive regional access strategies. The Councils would be comprised of institutional, K-12, community learning, and other regional stakeholders, and will guide the institutional development of Individual Access Plans.
- *System Coordination Review*: It is expected that new degree, diploma, and certificate program proposals would continue to undergo a *system coordination review* by the Ministry to assess the need for the program, and to consider how it fits with other programs currently offered within Alberta's advanced learning system.
- *Campus Alberta Quality Council*: Approval of degree programs under the *Post-secondary Learning Act* follows a two-stage review process once the Minister receives a proposal. For a program to be considered by the CAQC, it needs to be identified as a priority by the department, and (generally) funding sources need to be identified.

The department recognizes that this is an initial version of the *Alberta Access Planning Framework* and that the future development and value of the AAPF will depend on effective dialogue among system stakeholders and partners.

## Policy Outcomes

The *Alberta Access Planning Framework* (AAPF) should be considered within the outcomes-based context put forward in *A Learning Alberta* and further articulated in the *Roles and Mandates Policy Framework*. The AAPF should also be considered within the context of the *Affordability Framework for Post-Secondary Education* and other key initiatives to broaden access within Alberta's post-secondary system. At the institutional level, through the IAP submissions, it will be important for each institution to identify how they are supporting the outcomes. In addition, each program proposal, expansion, or capital request will be considered in the context of the policy outcomes below.

At its highest level, the Alberta Access Planning Framework aims toward the following outcomes:

- Increased access to post-secondary opportunities;
- Increased long-term engagement and transition into the post-secondary system; and
- A better articulated planning framework through the alignment of system capacity with the needs of learners and the labour market.

Furthermore, the AAPF reflects the following key outcomes, as identified in the *Roles and Mandates Policy Framework*. These outcomes should also be considered in the development of IAPs.

### ***Alberta has a Highly Educated Society***

Access strategies will depend on increasing access and participation in advanced education beyond creating physical spaces in post-secondary institutions. Developing innovative and flexible learning opportunities holds the potential to increase access and capacity, particularly among those who have not yet accessed advanced education. Jurisdictions with high levels of access have programs that raise awareness and aspirations, and disseminate information on learning opportunities.

### ***Communities Engage in Learning***

Access strategies will depend on the ability of post-secondary institutions to engage all key players within their communities, including K-12 learning providers, community-based learning agents, community organizations, industry and employers, immigration and settlement agencies, and governments of all levels. This engagement would result in collaborative efforts to increase access to learning opportunities, support the affordability of learning, and strengthen the link between learning and work. Partnerships and collaboration will also depend on the extent to which post-secondary institutions can provide opportunities for innovative approaches to learning, such as alternative delivery, blending working and learning, and valuing and assessing previously acquired skills and knowledge.

### ***Albertans Have Strong Learning Foundations***

Access strategies will depend on the extent to which learning providers can engage Albertans in continuous lifelong learning, requiring a greater emphasis and support for foundational learning, such as literacy, foundational skills development, and high school completion.

### ***The System Values and Builds on Skills and Knowledge***

Recognizing the increasing diversity among learners and that they do not necessarily follow a linear educational path, access strategies will depend on institutions' ability to better facilitate the entry of learners into, as well as transitioning within, the learning system and outwards into the labour market to build on previously acquired skills and knowledge through transition strategies such as Prior Learning Assessment and Recognition, credential laddering, and enhanced credit transfers.

### ***Institutions Foster Regional Economic Development***

Access strategies will depend on post-secondary institutions' ability to maintain strong linkages, by providing the necessary infrastructure and expertise to undertake activities (such as applied research) with their regional economic development partners and community players. This is necessary in order to ensure that skilled workers are produced in alignment with the needs of the regional labour market.

### ***The System Responds to Economic and Social Needs***

Access strategies will depend on institutions' ability and flexibility to collaboratively respond to changes in population demographics, the economy, and learner demands, providing an overall system that balances the short-term needs of the labour market and the longer-term needs of a globally competitive and knowledge-based economy.

### ***Technology is Leveraged to Foster Learning and Research Success***

Access strategies will depend on the ability of institutions to increase their utilization of technology in order to increase quality and access to flexible learning opportunities. Flexible learning opportunities include delivery technologies (e.g. distance and e-learning), information gathering and sharing systems to enhance learners' awareness and planning/decision-making information, and technology infrastructure to use for pure and applied research endeavours.

### ***Enhanced Access to Information Supports System Improvement***

Access strategies will depend on institutions making use of enhanced information sharing and knowledge transfer, providing a base for informed decision-making and effective planning in post-secondary institutions and government. For example, the Alberta Post-secondary Application System (APAS) plays a key role in the provision of applicant and learner demand information. Effective utilization of applicant demand information will allow for a more seamless and effective system response to learner demand, allow for better enrolment management, promote access and transition, and will also help inform the development of the Alberta Access Planning Framework and Individual Access Plans.

### ***Resources are Effectively Allocated***

Access strategies will depend on the system's ability to align funding to meet provincial, regional, and learner priority objectives and respond to emerging needs. Funding models will also provide incentives for collaboration, and cost structures will reflect the approved mandates of each institution.

### ***The System Fosters World Class Research and Innovation***

Access strategies will depend on the system's ability to enhance research capacity and performance. This is necessary in order to build a diversified and sustainable knowledge economy and ensure that research outcomes are transferred for the benefit of learners, society, and the economy.

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## Key Policy Directions

This section provides a high-level snapshot, based on analysis of the data and information presented in the AAPF and put into context of the preceding policy outcomes, of the broad policy directions on which the advanced education system should focus for the next 10 years. These areas, in no particular order, will need to be considered in the articulation of the IAPs:

- *Increased access in the following program bands:*
  - *Health/Health Sciences;*
  - *Business/Management;*
  - *Physical, Natural and Applied Sciences (includes engineering); and*
  - *Trades and Technology.*
- Alberta Employment and Immigration's forecasted labour market shortages show that the largest demand will be in the areas of Trades, Health Sciences, Physical Natural and Applied Sciences, and Business/Management.
- This analysis recognizes that a large portion of the required labour market shortages in the area of Business/Management will also be filled by graduates with a more general education background.
- The largest gaps between the predicted labour shortages and forecasted graduates are in the same areas – Trades, Health Sciences, Physical Natural and Applied Sciences, and Business/Management – while the gaps between all graduates and the predicted shortfalls in other areas are less pronounced.
- The largest number of turn-aways by program band in Fall 2007 were in Health Sciences; Trades and Technology; Business/Management; Languages, Social Sciences, Arts and Humanities; and Physical, Natural, and Applied Sciences.
- Increasing access in the Health/Health Science; Business/Management; Physical, Natural, and Applied Sciences; and Trades and Technology program areas will have the largest impact in enabling the post-secondary system to mitigate predicted labour market shortages.
- *Increased attraction and retention of students in graduate programs (Masters, PhD), with particular emphasis on graduate students in science-related programs.*
  - Analysis suggests that a significant portion of students applying for and completing graduate programs in Alberta originate outside the province.
  - While the data demonstrate a positive gain in terms of students that remain in Alberta following graduation, programs that facilitate the retention of graduate students could be beneficial to the province.
  - Retaining graduate students is vital to Alberta: it ensures a labour pool from which Alberta's post-secondary institutions may draw in the future, aids the transition from a resource-based to a knowledge-based economy, and has a tremendous overall positive impact on Alberta society.
  - By focusing particularly on students in science related programs, this policy will help support the goals and outcomes articulated in the Alberta Research Planning Framework.

- *Enhanced collaboration among institutions, including such elements as credential laddering opportunities, transfer programs, and other learner pathway programs.*
    - At a system wide level, Alberta's post-secondary system can expect to increase by approximately 23,000 FLEs over the next decade; this growth, however, will be variable across regions.
    - In order to maximize the uptake of available spaces and ease the pressure on over-subscribed programs/institutions, the post-secondary system should holistically work to develop collaborative arrangements that maximize the use of existing system capacity while satisfying learner needs.
  - *Increased access for under-represented groups.*
    - Given Alberta's increasing Aboriginal population and the current lower levels of educational attainment within that population, policies that are successful at increasing Aboriginal post-secondary participation in Alberta will have a stated effect on Alberta's overall educational attainment levels.
    - Increasing educational attainment levels among under-represented groups in Alberta has the potential to offset the labour market shortages threatening Alberta's economic growth, while simultaneously offsetting the economic and societal disparity that currently exists between some communities in Alberta.
  - *Proactive strategies to deal with immigrant education and training needs, improved policies to articulate the role of international students in Alberta's advanced education system, and mechanisms to address retention.*
    - Immigration to Canada is increasing, with Alberta gaining an increasing proportion of Canada's recent immigrants. Almost all of Alberta's future population growth is expected to come from immigration.
    - Immigrants are more likely than ever before to come from non-European, non-English speaking countries, and are often highly educated.
    - Combined with Alberta's current and future labour market shortages, it is becoming increasingly important to put into place processes that enable people to have their skills and prior learning recognized, obtain new training to update and improve their skills, and facilitate foundational learning opportunities that enable immigrants to effectively engage with society as new Albertans.
    - International students bring a diversity of perspective to Alberta's advanced learning system and a desire to learn and engage with Alberta society. International students are often highly represented at the University and graduate degree level, with skills to build the province's knowledge economy.
    - Strategies to attract and retain international students have the potential to build Alberta's research and innovation capacity, strengthen the diversity of knowledge in our post-secondary institutions, and contribute to solving Alberta's current and projected labour market shortages.
    - In attracting and retaining international students to Alberta's post-secondary institutions, strategies must recognize that international students cannot displace eligible Alberta learners. In addition, strategies must be clearly planned and articulate its response to the policy outcomes and priorities listed in both this and the Alberta Access Planning Framework documents.
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## ***Timelines and Next Steps***

### ***May 2008***

- Create the Campus Alberta Strategic Directions Committee.
- Convene this group to share the vision for the future of post-secondary education and further developments and implementation activities with the Roles and Mandates Policy Framework, including the Alberta Access Planning Framework.

### ***June 2008***

- Regional Profiles System.
- Develop a planning tool to augment the AAPF with regional specific information, and ensure more rigorous use and sharing of demand and planning information and responsiveness to regional demands.
- Provide an update on the Roles and Mandate Policy Framework and the Alberta Access Planning Framework to institution representatives.

### ***June-July 2008***

- Create a collaboration tool to provide insight on emerging issues and the implementation of the AAPF to be used when Institutional Access Plans are being developed.

### ***June-September 2008***

- Work with stakeholders to communicate and provide feedback on a revised funding model, the approach to establishing enrolment targets, and IAP review processes.

### ***September 2008***

- Meetings with institutions to provide information on a regional basis to assist in the development of Institutional Access Plans.

### ***October 2008***

- Institutional Access Plans to be submitted to and reviewed by the Minister.

### ***February-March 2008***

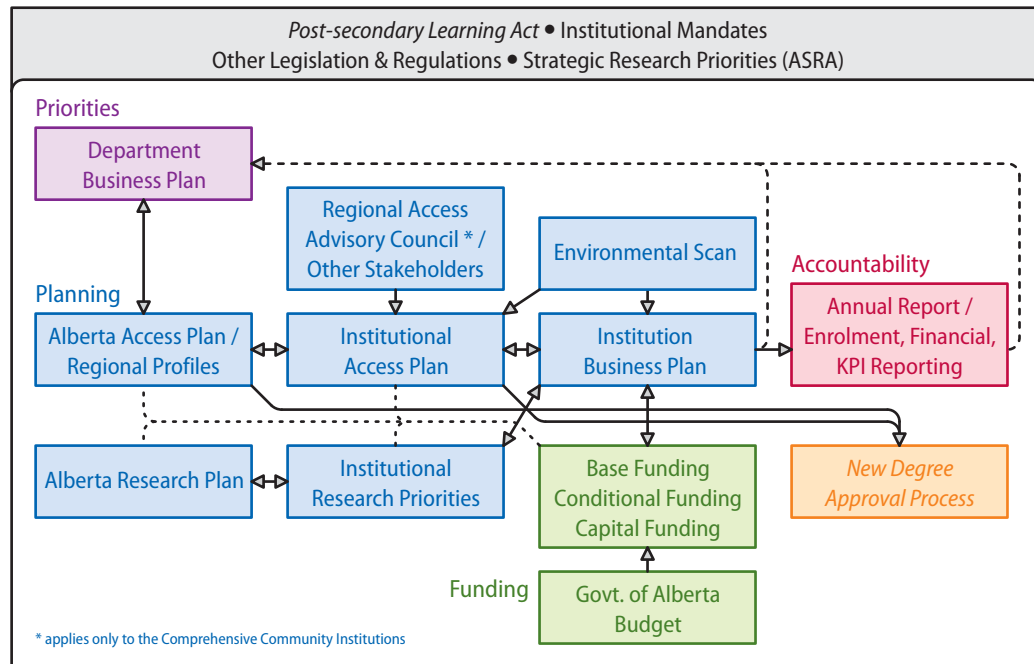
- Next iteration of the Alberta Access Planning Framework is released.
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## Planning and Priority Setting Process

This section provides a brief overview of the planning and priority setting process and its key components as set out in the *Roles and Mandates Policy Framework* and further refined by the Funding and Accountability and Planning and Access working groups.

Figure 1

Planning and Priority Setting Process



### Alberta Access Planning Framework and the Department's Business Plan

- The department's Business Plan sets the strategic direction for the Ministry.
- The Alberta Access Planning Framework aims to help identify opportunities and challenges in achieving outcomes related to system access.

### Institutional Access Plans and Institutions' Business Plans

- The department will dialogue annually with institutions on Institutional Access Plans in order to align strategic access objectives. The Institutional Access Plan will become an integral part of institutions' Business Plan submissions.
- Guidelines for the development of Institutional Access Plans are outlined in Appendix B.

### AAPF and the Alberta Research Planning Framework

- In support of the Roles and Mandates Policy Framework, an effort is being undertaken to develop an Alberta Research Planning Framework. This framework will lay out Alberta's strategic research priorities and a process by which Alberta entities engaged in research will contribute to these priorities.
- The Alberta Research Planning Framework will be completed following a process to develop a common vision and outcomes for Alberta's research system.
- It is anticipated that the Framework will be presented to funders, performers, and commercialization agents as a discussion document in late 2008.

## Program Approval

- The principle underlying the program approval process is to create a post-secondary system that is of high quality and responsive to learner and societal needs.
- In addition, recognizing the increasing diversity among learners and that they do not necessarily follow a linear educational path, access strategies will depend on institutions' ability to better facilitate the entry, and transitioning of learners within the learning. Building on previously acquired skills and knowledge through transition strategies, such as Prior Learning Assessment and Recognition, credential laddering, and enhanced credit transfers, is critical in this labour market. The Alberta Council on Admissions and Transfer will play a key role in this work.
- The process for program approval differs depending on whether the proposal is for a degree or non-degree program:

### *Degree Programs*

- Approval of degree programs follows a two-stage review process. Stage 1 is a system coordination review of the proposed program by the Ministry to determine whether there is a need for the program and how it fits with other programs currently offered within Alberta's post-secondary system.
- Stage 2 is a quality review of the proposal by the Campus Alberta Quality Council (CAQC). The onus is on the applicant institution to satisfy CAQC that the level of learning to be achieved is consistent with the proposed degree level.
- Should the institution successfully complete Stages 1 and 2, CAQC makes a recommendation of program approval to the Minister.

### *Non-Degree Programs*

- Approval of non-degree programs involves only one stage. New programs are reviewed in the context of the Ministry's responsibility to ensure responsiveness to emerging educational and labour market trends, to encourage collaboration among institutions, to provide for student access and program affordability, to prevent unwarranted program duplication, to ensure institutional capacity, and to ensure the existence of a viable financial plan.
- Consultations with appropriate stakeholders such as industry and professional associations are required to ensure the program is relevant to their needs. Should the program satisfy the requirements of the review, then the department recommends program approval to the Minister.

## Capital Planning

- Capital Planning and priority setting is driven by the Government of Alberta budget and by the Alberta Access Planning Framework. The Alberta Access Planning Framework and Institutional Access Plans will become integral to the capital planning process. Please see the key criteria used in considering capital projects in Appendix C.
- It is not the expectation that IAPs will contain the detailed capital infrastructure plans, given that such plans will still be submitted through the Government of Alberta capital projects review process.

## Funding

- The following information on funding is being presented as a context for future planning. While the funding framework will not be in place until 2009, it is important to begin considering the funding mechanisms in the overall context of access planning.
- The department's approach to funding post-secondary institutions was reviewed during the *Roles and Mandates Policy Framework* working group consultations with system stakeholders and partners.
- The working group reviewed the Base Operating Grant, Enrolment Planning Envelope, and Performance Envelope. Consideration was given to several options for providing base operating funding. Models considered were driven by clearly identifiable accountability measures and outcomes, such as those contained in the *Roles and Mandates Policy Framework*, and the principles of Campus Alberta.
- The funding model is being updated to reflect the principles of the *Roles and Mandates Policy Framework* and the integration of the Alberta Access Planning Framework into the planning and priority setting process.
- Subsequent implementation teams may be established to ensure full implementation of both the overall *Roles and Mandates Policy Framework* and the input from the working groups. For example, it is anticipated that specific implementation teams will need to be established to work through the adoption of the funding mechanism in April 2009 to accommodate the new model.

### Funding Model: Access Outcomes Model

- *Enrolment Planning Envelope*  
The EPE provides funding for the incremental costs associated with the expansion of enrolment that responds to student and economic needs and demands. EPE grant proposals will be created based on the institution's Institutional Access Plan and will be guided by the AAPF.
- EPE proposals submitted by institutions will be classified into three categories:
  - *Category A* are proposals directly supporting priorities identified in the AAPF.
  - *Category B* are proposals identified in the IAPs. These proposals are consistent with overall provincial policy and priorities but are not specifically identified in the AAPF.
  - *Category C* are proposals specifically designed to enhance collaboration.
- A *Targeted Enrolment Level* is established for each institution based on existing funding levels and capacity.
- The program cost criteria recognizes the differential cost and level of programs (i.e., graduate vs. undergraduate). Only FLEs counted in the tuition fee policy are reflected in targeted enrolment. *Enrolment Corridors* are established as follows (the Targeted Enrolment Level is equivalent to 100%):

<i>Corridor</i>	<i>Range</i>
Zone 1 Corridor	97% to 103% of target enrolment level met
Zone 2 Corridor	90% to 97% of target enrolment level met

- Enrolment corridors are used as a basis for planning, including the AAPF, Institutional Access Plans, and system planning review, and also to inform funding decisions through the Enrolment Planning Envelope and Performance Envelope.

- The portion of cost provided to an institution – its success in gaining EPE resources – will vary based upon program cost, as well as current levels of enrolment relative to the institution’s corridor.
  - Depending upon where an institution is in its corridor, the Ministry will have the capacity to identify an equivalent number of spaces for an institution to expand access.
  - *Collaborative Programs* in the revised funding model will recognize and reward collaboration, for both the hosting and credentialing institutions.
  - A separate stream will be established within the Enrolment Planning Envelope to fund collaborative initiatives (Category C proposals).
  - Collaborative program proposals and funding approvals will reflect the following:
    - Like other program expansion proposals, learner and economic demand will need to be demonstrated and considered in the relative context among priorities. The proposals will be considered in the context of the Key Considerations Criteria. (see Appendix C);
    - For purposes of counting enrollment and contributions toward the institution’s overall target, both institutions will be able to count enrollment;
    - Funding needs to take into consideration the actual cost and delivery for both the hosting and credentialing institution; and
    - For new degree-level programs, collaborative arrangements will be considered a priority.
    - Funding for collaborative programs will flow to the hosting institution. A Memorandum of Understanding will need to be prepared between the credentialing and hosting institutions to outline cost and resource arrangements.
    - The base rate for considering collaborative undergraduate degree proposals will be the base rate provided to public universities (e.g., for years 3 and 4).
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## ***Institutional Access Plans (IAPs) – Key Components***

### ***Requirements***

Under the *Roles and Mandates Policy Framework* and the proposed terms of the *Post-secondary Learning Act*, institutions are required to submit access plans annually as a part of system-wide development and planning and institutional accountability to government. Institutions are required to submit annual reports that compare desired outcomes to actual outcomes.

Institutional Access Plans (IAPs) should describe the institutional response to the Alberta Access Planning Framework (AAPF) and reflect the demographic, student, and labour market needs of the institution's particular service region. The AAPF will provide information on government access priorities and significant trend data which can be used to guide the IAP. A brief outline of the key components of the IAP is provided below, including: Institutional Context; IAP Development; Access Goals, Strategies, Expected Outcomes and Performance Measures; Projected Resource Implications; and Appendices.

### ***Institutional Context***

The context for the goals and strategies identified, including:

- Approved mandate statement (public institutions) or mission statement (publicly funded private institutions);
- Linkages to Advanced Education and Technology business plan and relevant Government of Alberta policy documents;
- Access goals from previous institutional strategic plan (if applicable) and business plan;
- Relevant provincial demographic, social, educational, and economic characteristics and trends;
- Relevant service region demographic, social, educational, and economic characteristics and trends with linkages to the AAP (Except CARIs and SACIs); and
- Strategic access objectives, as identified in the AAP, pertaining to the sector, region, and institution.

### ***IAP Development***

- Provide a brief description of the development process for the plan, including regional and system consultation and collaboration.
- A CCI should provide information about the community based adult learning access and service goals identified by the Regional Access Advisory Council for the region served by the college.

### ***Access Goals, Strategies, Expected Outcomes and Performance Measures***

- The institution's access goals, strategies, and expected outcomes over the plan's four-year period.
- Provide linkages to the AAPF for goals reflecting provincial priorities and relate institution- and service region-specific goals to the AAPF and other government sources. Goals should reflect categories such as enrolment patterns, program development, program restructuring and termination, learner services, completion rates, learner transitions (including transferability), and community responsiveness.
- Review current access goals and strategies in relation to goals and strategies from the previous plan.
- Link access goals and strategies to the AAP, Roles and Mandates Policy Framework, and Campus Alberta philosophy.
- Identify system and regional implications of the goals and strategies (e.g., warranted vs. unwarranted duplication, collaboration, and Campus Alberta).
- Relationship between access goals and strategies and research mandate for Comprehensive Academic and Research Institutions (CARIs).
- Performance targets and measures for the access goals and strategies.
- Other related performance targets and measures with respect to institution-specific planned outcomes.

### ***Resource Implications***

- Budget assumptions and strategies underlying the access goals and strategies including re-allocation of funding and facilities, increased efficiencies, and funding from third parties. (These assumptions and strategies will be further developed in the institution's business plan.)

### ***Appendices***

- Include strategic plan (if applicable).
  - Tables supporting access goals.
  - Tables presenting enrolment projections for identified access goals related to, for example, graduate enrolment, time to program completion, participation of under-represented groups, community-based adult learning, and e-learning. Utilize Learner and Enrolment Reporting System and Application Submission Initiative data wherever possible.
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## Capital Planning – Key Considerations

Key Area of Consideration	Valuation			
<b>General</b>				
Expansion project	<input type="radio"/> New construction	<input type="radio"/> Addition to existing		
Preservation project	<input type="radio"/> Less than \$2.5 million	<input type="radio"/> More than \$2.5 million		
Alignment with Alberta Access Plan?	<input type="radio"/> Yes	<input type="radio"/> No		
Required to implement Institution Access Plan?	<input type="radio"/> Yes	<input type="radio"/> No		
Identified in Institution Business Plan?	<input type="radio"/> Yes	<input type="radio"/> No		
Aligned with Alberta Research Plan?	<input type="radio"/> Yes	<input type="radio"/> No		
Supports Provincial Networks of Excellence?	<input type="radio"/> Yes	<input type="radio"/> No		
Preliminary business case completed?	<input type="radio"/> Yes	<input type="radio"/> No		
Planning funding has been provided?	<input type="radio"/> Yes	<input type="radio"/> No		
Program funding has been approved?	<input type="radio"/> Yes	<input type="radio"/> No		
<b>Infrastructure Indicators</b>				
Responds to life, health and safety issues?	<input type="radio"/> Yes	<input type="radio"/> No		
Responds to program delivery requirements? (maintaining credentials)	<input type="radio"/> Yes	<input type="radio"/> No		
Project based on sustainability/LEED targets?	<input type="radio"/> Yes	<input type="radio"/> No		
Increases access (square metre/FLE)	<input type="radio"/> High	<input type="radio"/> Medium	<input type="radio"/> Low	
Improves utilization of existing facilities	<input type="radio"/> High	<input type="radio"/> Medium	<input type="radio"/> Low	
Recaptures or repurposes existing space	<input type="radio"/> High	<input type="radio"/> Medium	<input type="radio"/> Low	
Allows for future program flexibility	<input type="radio"/> High	<input type="radio"/> Medium	<input type="radio"/> Low	
Addresses functional deficiencies	<input type="radio"/> High	<input type="radio"/> Medium	<input type="radio"/> Low	
Address condition or deferred maintenance	<input type="radio"/> High	<input type="radio"/> Medium	<input type="radio"/> Low	
Project results in reduced operating expenses	<input type="radio"/> High	<input type="radio"/> Medium	<input type="radio"/> Low	
<b>Current Capacity</b>				
Current Enrolment Level	<input type="radio"/> Above Corridor	<input type="radio"/> Zone 1	<input type="radio"/> Zone 2	<input type="radio"/> Below Corridor
Physical Capacity	<input type="radio"/> Within Existing Capacity		<input type="radio"/> Requires Capacity Expansion	
<b>System Impact and Collaboration</b>				
Project will provide instructional space required to deliver new, high-demand programs?	<input type="radio"/> Yes	<input type="radio"/> No		
Project will provide instructional space required to increase access to existing programs that are in high demand?	<input type="radio"/> Yes	<input type="radio"/> No		
Project will result in space that will be used by more than one post-secondary institution?	<input type="radio"/> Yes	<input type="radio"/> No		
Program is part of a larger GOA or joint Ministry initiative?	<input type="radio"/> Yes	<input type="radio"/> No		
Project is important to stakeholders as evidenced by fundraising, municipal support, industry support, etc.??	<input type="radio"/> Yes	<input type="radio"/> No		
Project will attract investment and highly qualified personnel to the province?	<input type="radio"/> Yes	<input type="radio"/> No		

## System Planning – Key Considerations

Key Area of Consideration	Valuation			
<b>General</b>				
Expansion or New Program?	<input type="radio"/> Expansion	<input type="radio"/> New Program		
Within Institutional Mandate?	<input type="radio"/> Yes	<input type="radio"/> No		
Reflected in Institutional Access Plan?	<input type="radio"/> Yes	<input type="radio"/> No		
<b>Alberta Access Plan and Demand</b>				
Supports Alberta Access Plan Framework?	<input type="radio"/> Yes	<input type="radio"/> No		
Regional Population Growth (AAP, 18-24 age cohort)	<input type="radio"/> High	<input type="radio"/> Medium	<input type="radio"/> Low	
Provincial Program Economic Demand Forecast	<input type="radio"/> High	<input type="radio"/> Medium	<input type="radio"/> Low	
Regional Program Economic Demand Forecast	<input type="radio"/> High	<input type="radio"/> Medium	<input type="radio"/> Low	
Program Turn-Aways - Provincial (ASI)	<input type="radio"/> High	<input type="radio"/> Medium	<input type="radio"/> Low	
Program Turn-Aways - Local (ASI)	<input type="radio"/> High	<input type="radio"/> Medium	<input type="radio"/> Low	
<b>Current Capacity</b>				
Current Enrolment Level	<input type="radio"/> Above Corridor	<input type="radio"/> Zone 1	<input type="radio"/> Zone 2	<input type="radio"/> Below Corridor
Physical Capacity	<input type="radio"/> Within Existing Capacity		<input type="radio"/> Requires Capacity Expansion	
<b>System Impact and Collaboration</b>				
Buils on existing program offerings at the institution?	<input type="radio"/> Yes	<input type="radio"/> No		
Is this or similar program offered at other institutions - provincially?	<input type="radio"/> Yes	<input type="radio"/> No		
Is this or similar program offered at other institutions - regionally?	<input type="radio"/> Yes	<input type="radio"/> No		
Will the program rely on existing curricula offered elsewhere?	<input type="radio"/> Yes	<input type="radio"/> No		
Will the program be offered under a collaborative arrangement?	<input type="radio"/> Yes	<input type="radio"/> No		
Is there adequate capacity elsewhere within the system?	<input type="radio"/> Yes	<input type="radio"/> No		
Is there adequate capacity elsewhere within the region?	<input type="radio"/> Yes	<input type="radio"/> No		
Has the institution identified a funding source?	<input type="radio"/> Yes	<input type="radio"/> No		
Does the program build on research synergy or supports a Centre of Excellence?	<input type="radio"/> Yes	<input type="radio"/> No		
<b>Learner Pathways and Outcomes</b>				
Related programs have been identified?	<input type="radio"/> Yes	<input type="radio"/> No		
Key transfer arrangements identified?	<input type="radio"/> Yes	<input type="radio"/> No		
Is the proposal supported by current providers of same/similar programs, or related sending or receiver programs?	<input type="radio"/> Yes	<input type="radio"/> No		
Graduate Employment Rates for this and related programs within the system	<input type="radio"/> Above Average	<input type="radio"/> Average	<input type="radio"/> Below Average	
Student Satisfaction - Institution	<input type="radio"/> Above Average	<input type="radio"/> Average	<input type="radio"/> Below Average	
Program Completion Rate	<input type="radio"/> Above Average	<input type="radio"/> Average	<input type="radio"/> Below Average	
What are the enrolment implications outside the institution?	<input type="radio"/> Positive	<input type="radio"/> Neutral	<input type="radio"/> Negative	