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# Tab 1



## **A Summary of the Post-Secondary Education Accountability Framework Working Paper (20 Dec 2002)**

### **I. Introduction**

#### **a) Purpose of the Accountability Framework**

The primary purpose of the Accountability Framework is to benefit students by encouraging a focus on serving students' interests. It is a means for linking government's priorities with Ministry and institution strategic goals, and addresses the government's commitment to openness, accountability and demonstrating value to taxpayers.

#### **b) Description of the Accountability Framework**

The Ministry's strategy is to develop an Accountability Framework that allows differentiated post-secondary education institutions to work together in a complementary manner as interdependent parts of a coherent and integrated public system to achieve strategic goals and priorities in an accountable manner.

Responding to society's needs requires effective system planning and the capacity to be directed by a set of strategic goals and objectives. All organizations are accountable for fulfilling their responsibilities and reporting on their performance.

The Accountability Framework will articulate what institutions are accountable for, how success will be measured, what reporting is required and what implications follow from performance. The Accountability Framework's focus on results is consistent with, and encourages, institutional autonomy.

The main instrument of accountability in the Framework is a set of performance measures to determine and report on successes in meeting goals and objectives. As is now required of all government ministries, institutions will be required to develop service plans and reports as a way to outline their accountabilities, the means for meeting them, and their success in achieving the plan. The term service plan refers to a strategic plan that also includes some level of operational planning detail with respect to proposed programs and levels of service.

#### **c) Anticipated results**

- enhanced collaboration between the Ministry, institutions and system partners
- increased effectiveness in managing the system and use of budget resources
- continuous improvement of the quality of post-secondary education
- ability to demonstrate that taxpayers' money is well spent
- stronger linkages to government's strategic goals and objectives
- focus on results, primarily related to student outcomes
- more efficient and integrated post-secondary education system
- enhanced student choice
- balance of costs and benefits of post-secondary education
- shortages in strategic skill areas addressed
- expanded training and skill development
- expanded research capabilities in the province



## II. The Accountability Framework Initiative

### a) *Development of the Accountability Framework*

The Ministry has consulted with a variety of groups, and researched programs in place in other jurisdictions. The collaborative approach underlying the development of the Accountability Framework will be maintained as a way of balancing potentially diverse needs and interests.

### b) *Scope of the Accountability Framework*

The initial Accountability Framework encompasses all public post-secondary education institutions and the Ministry.

## III. Accountability Framework Components

The Accountability Framework integrates the key elements of service planning, performance measurement and reporting relevant to managing the post-secondary education system.

The Accountability Framework sets clear strategic goals and objectives for the post-secondary education system, and allocates responsibilities for achieving these to various bodies in the system. To assess the effectiveness of the system in achieving those goals, performance measures are established and processes established for regular reporting on those measures. This performance information is used in decision-making.

### a) *Strategic Direction and System-Level Accountability*

Strategic direction cascades from the government's strategic plan to the Ministry Service Plan to the institutions. The Ministry's strategic goals and objectives flow from the vision: "A province where all British Columbians have affordable access to the best possible, technologically advanced, integrated and accountable post-secondary education system."

#### **Ministry Goals and Objectives**

##### *Goal 1: A Top-Notch Post-Secondary Education System*

*To provide students with an accessible, affordable, high-quality and relevant post-secondary education*

##### **STRATEGIC OBJECTIVES**

1. Promote a more efficient and integrated post-secondary education system
2. Enhance student choice
3. Improve the quality of education
4. Balance the costs and benefits of post-secondary education

##### *Goal 2: Economic and Social Development*

*To provide students with the skills and knowledge for the workforce and the economy, and to respond to critical shortages in the labour market.*

##### **STRATEGIC OBJECTIVES**

5. Address shortages in strategic skills areas
6. Expand training and skills development
7. Expand research capabilities in the province

For the first phase of the Framework, the Ministry Service Plan will provide direction to the system. Consultation with system partners in future Service Plan development will enhance the strategic direction.

**b) *Roles and Responsibilities***

The Framework is the means for the Ministry to articulate accountabilities to the institutions, and for the institutions and the Ministry to clearly articulate accountabilities to the public. In both cases, there must be clear linkages with the strategic direction of government.

The Minister is required to produce an annual Service Plan that articulates Ministry responsibilities, sets goals and objectives, and identifies performance measures to assess success in meeting those goals and objectives, and an Annual Service Plan Report. The Plans and Reports are tabled in the Legislature and made public.

The Ministry will annually provide budget and accountability letters articulating institutional accountabilities to each institution. They will set out Ministry priorities and expectations regarding system goals, specific institutional goals, and performance and funding levels for the coming year. These will be informed by the strategic direction in the Ministry's Service Plan and will be linked to each institution's service plan. The letters will contain common elements, deliverables and performance measures that apply to all institutions, and specific elements unique to each institution. Institutions should ensure that their unique missions and mandates are appropriately reflected in the letter.

Institutional service plans will articulate the institution's accountabilities and how they will deliver on those responsibilities. They will include an environmental scan, statement of institution goals and objectives that complement system level goals, and performance measures and targets. They will reflect an outcomes orientation and be publicly accessible.

**c) *Performance Measures***

Performance measures track progress achieved toward identified goals and objectives. Performance measures can focus on inputs, processes or activities, outputs or outcome.

The Accountability Framework includes performance measures contained in the Ministry Service Plan that are within the scope of the Framework (10), initiatives which were included in the institution budget letter (3), and 9 additional measures that were considered to be priorities relevant to stated goals and objectives for a total of 22 performance measures.

All performance measures used in the Accountability Framework are linked to one or more of five key education principles:

<b>1. Capacity</b>	The post-secondary system is of sufficient size to meet the demands of the province.
<b>2. Quality</b>	The post-secondary system is of sufficient quality to meet the requirements of students, employers, and citizens.
<b>3. Comprehensiveness</b>	The post-secondary system is relevant and responsive to the needs of the province by providing the appropriate scope and breadth of education programs.

<b>4. Efficiency</b>	The post-secondary education system is able to deliver education programs to students in a timely and efficient manner.
<b>5. Accessibility</b>	All citizens have equitable and affordable access to post-secondary education.

The Accountability Framework contains a chart of proposed Performance Measures, linked to the Ministry objectives and related Areas of Performance Interest (sub-sets of each objective) and the key education principles. No definitions of the measures are included. While use of similar measures in other jurisdictions is noted, differences in the scope and definition of the measures, and in data collection methodologies make it difficult or impossible to compare across jurisdictions.

It is proposed that for the first year the targets be based on budget letter targets or a simple increase or decrease from the baseline. Three-year targets will be developed, in consultation with system partners, once the performance measures are adopted and the data elements are precisely defined.

Reporting on performance measures is dependent on efficient and effective data collection and an integrated and coordinated system of data management.

**d) *Reporting***

In the first phase of the Accountability Framework, the Ministry's Annual Service Plan Report will serve as the system-level report. Institutions will submit an annual report on their accomplishments and on the progress they have made towards meeting their service plan goals and objectives to the Select Standing Committee on Education as well as to the Ministry; these reports will be publicly accessible.

**e) *Performance-Based Implications***

Performance information is intended to have an impact on decision-making and bring about improvement. In the first phase, public reporting will be the primary motivator to improve performance. The Ministry retains the ability to reallocate resources through the annual budget process. Consideration of an incentive fund tied directly to key performance measures that would provide additional funds, probably a small percentage of operating grants, to institutions is proposed. Development of such a fund would have to link with the planned funding mechanism review.

**f) *Evaluation and Review***

The Accountability Framework will be periodically reviewed to determine whether it is benefiting students and furthering the goals of post-secondary education. The review will specifically gauge the utility and relevance of the performance information and its contribution to the improvement and enhancement of the quality of students' education.

The review will include:

- the extent to which the Framework effectively assesses the performance of the post-secondary education system including the evaluation of the set of performance measures



- the efficiency, effectiveness and appropriate design and implementation of the framework and its components
- the linkage of the framework to other evaluation activities including institutional evaluation and program evaluation and their place within an integrated accountability system
- the effectiveness of the performance measures in fostering improvement

#### IV. Implementing the Framework

##### a) *Typical Annual Accountability Cycle:*

**Ministry Service Plan:** begun in September, tabled in the Legislature in February

**Budget and accountability letters:** draft letters are discussed with each institution in January/February; final letters are sent to institutions by end of February

**Institutional Service Plans:** begun in September and finalized after the institution receives its budget and accountability letter

**Reporting:** the annual Ministry Report covering the past fiscal year must be tabled in the Legislature by August 31

**Performance Implications:** Data reported annually by institutions to Ministry and public feed into the Ministry's Annual Report and budget. Impacts of performance information on system and institutional decision-making are noted.

##### b) *System Participation in ongoing Management*

**Executive-level Steering Committee** provides input into the model, process; monitors progress on implementation and deals with problems and issues.

**The Data and Performance Measure working group** reviews and refines performance measures; research target information

**The Evaluation Committee** identifies best practices; links with institutional research evaluation activities.

#### Next Steps

Responses to this working paper may be submitted to January 31, 2003.

SCOE/Summary  
kmb

## Goal 1: Top-Notch Post-Secondary Education System

*To provide students with an accessible, affordable, high quality and relevant post-secondary education*

Objective	Area of Performance Interest	Key Education Principle	Performance Measures	Rationale	Target
Promote a more efficient and integrated post-secondary education system	Improve Graduation Rates	Efficiency	Number of degrees, diplomas, certificates awarded	Successful achievement of credentials by students reflects the capacity of the system to meet the demand of students for quality education and the demand of the economy for qualified graduates. Credentials awarded in relation to resources available demonstrate efficiency in education delivery.	Baseline: 2001/02 Increase
			BC public post-secondary system graduate rate	A measure of the net benefit of an expected increase in credentials awarded.	Baseline: 2001/02 Increase
	Encourage System Integration	Efficiency	Number of block & course transfer agreements	Indicates the opportunity available to students to transfer earned credit between public institutions in BC.	Baseline: 2001/02 Increase
			Student satisfaction with transfer	Provides a learner centred evaluation of system efficiency and effectiveness in facilitating transferability of credit between institutions.	Baseline: 2002/03 Maintain

Objective	Area of Performance Interest	Key Education Principle	Performance Measures	Rationale	Target
Promote a more efficient and integrated post-secondary education system	Access to Developmental Programs	Access-ibility	Number of student spaces in ABE/ESL/ ASE	Indicates the commitment by institutions to provide developmental education programs to students in accordance with Ministry policy.	Baseline: 2001/02 Maintain
	Participation in Post-Secondary Education by Aboriginal Students	Access-ibility	Total number and percent of student population that is aboriginal	Participation in further education by aboriginal students is a key strategic priority for government and post-secondary institutions in BC.	Baseline: 2002/03 Maintain or increase
	System Capacity	Capacity	Total student spaces	Indicates actual system capacity and allows comparison to intended system capacity	Baseline: 2001/02 Increase by targeted amounts



<b>Objective</b>	<b>Area of Performance Interest</b>	<b>Key Education Principle</b>	<b>Performance Measures</b>	<b>Rationale</b>	<b>Target</b>
Promote a more efficient and integrated post-secondary education system	Space Utilization	Capacity	Facility utilization for education activity	Maximizing utilization of institution facilities for education activity is a government strategic priority.	Baseline 2000/01 Increase delivery between May & August
Enhance student choice	Expanded Access for Students to On-Line and e-campus Initiatives	Access-ibility	Number of student spaces in on-line learning	On-line learning programs provide increased access, flexibility and choice for students pursuing post-secondary education.	Baseline: 2001/02 Increase by targeted amounts
Improve quality of education	Quality Enhancement	Quality	Student outcomes – skills gained	Student's assessment of the degree by which their program allowed them to gain identifiable and tangible skills is a recognized proxy measure of the level of quality in education programs in BC.	Baseline: 2002/03 Maintain/ Increase

Objective	Area of Performance Interest	Key Education Principle	Performance Measures	Rationale	Target
Improve quality of education	Quality Enhancement	Quality	Student satisfaction with education	Quality is in part reflected by the value students place on their overall education experience.	Baseline: 2002/03 Maintain/ Increase
			Student satisfaction with quality of instruction	Learner centred assessment of how education programs are instructed is a measure of the quality of program delivery in BC.	Baseline: 2002/03 Maintain/ Increase
	Ensure relevance through enhancing student employability	Quality	Student assessment of usefulness of knowledge & skills in performing job	This measure reflects the student's assessment of the knowledge and skills they gained in relation to the demands of their subsequent employment.	Baseline: 2002/03 Maintain/ Increase
		Quality	Student outcomes – unemployment rate	One expected outcome of post-secondary education by students and society is the successful transition to the labour force.	Baseline: 2003/04 Maintain/ Decrease

Objective	Area of Performance Interest	Key Education Principle	Performance Measures	Rationale	Target
Balance the costs and benefits of post-secondary education	Ensure Education Costs are Shared Equitably	Access-ability	Percent of graduates with debt & ratio of average debt to average income after graduation	This measure reflects the cost impact and net financial benefit of post-secondary education for students.	Baseline: 2002/03

## Goal 2: Economic and Social Development

*To provide students with the skills and knowledge for the workforce and the economy, and to respond to critical shortages in the labour market*

Objective	Area of Performance Interest	Key Education Principle	Performance Measures	Rationale	Target
Reduce shortages in strategic skill areas	Increase Graduates From Programs Addressing Identifiable Skill Shortages	Comprehensiveness	Number of computer science, electrical and computer engineering student spaces	The Ministry works with institutions to address identified skill shortages in high technology areas.	Baseline: 2001/02 Increase by targeted amounts
			Number of social/child protection work student spaces	The Ministry works with institutions to address identified skill shortages in social work and child protection areas.	Baseline: 2001/02 Increase by targeted amounts
			Number of RN's, LPN's and RCA and other Allied Health student spaces	The Ministry works with institutions to address identified skill shortages in health care.	Baseline: 2001/02 Increase by targeted amounts

Objective	Area of Performance Interest	Key Education Principle	Performance Measures	Rationale	Target
			Number of medical school student spaces	The Ministry works with institutions to address identified skill shortages in health care.	Baseline: 2001/02 Increase by targeted amounts
Expand training and skill development	Increase General Trades Training and Apprenticeship	Comprehensiveness	Number of entry level trades training (ELTT) spaces in institutions	The Ministry works with institutions to increase general trades training and apprenticeships. The number of training spaces indicates the capacity of the industry training system to meet the demand for skilled workers.	Baseline: 2001/02 Increase by targeted amounts
Expand research capabilities in the province	Strengthen the Provincial Research Capacity	Quality	Federal / Provincial funding support for research	The Ministry supports post-secondary institutions mandate to conduct original research in all areas of knowledge. This is a measure of public institutions success in attracting sponsored research funding.	Baseline: 2002/03 Maintain/ Increase
		Quality	Number of licenses, spin-offs companies (under development)	This is a measure of public institutions success in attracting and converting sponsored research funding into economic and social tangible benefit.	Baseline: 2002/03 Maintain/ Increase

# Tab 2







Exec Ctte.  
Agenda.

Jan 2/02



IT'S OUR TIME  
TO SHINE

DEC 20 2002

Our Ref. 43338

Dr. Roger Barnsley  
President  
The University College of the Cariboo  
PO Box 3010  
900 McGill Road  
Kamloops BC V2C 5N3

Dear Dr. Barnsley:

As committed to in the meeting of the Minister with Board Chairs and Presidents on December 16, 2002, I am providing you with the working paper *An Accountability Framework for the Post-Secondary Education System*.

The paper and the framework it sets out have benefited from constructive advice from a small Advisory Group of Presidents, though of course the Ministry remains responsible for its contents. In addition, the current state of the performance measures owes much to the group of Institutional Research Directors who have reviewed this aspect of the framework.

The paper is being distributed to the Board Chairs and Presidents of all institutions, and your response to the paper is invited before January 31, 2003. At the same time, a shorter paper appropriate for broader public response has been placed on our Ministry website.

Sincerely,

for Gerry Armstrong  
Deputy Minister

Enclosure

pc: Mr. Jim Soles, Assistant Deputy Minister  
Post-Secondary Education Division

Mr. Bo Hansen, A/Director  
Accountability Branch



**WORKING PAPER:**

**An Accountability Framework  
for the  
Post-Secondary Education System**

**Ministry of Advanced Education  
December 20, 2002**



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## I. Introduction

### Purpose

The purpose of the accountability framework is to benefit students: to ensure that students have quality education and that they have educational opportunities relevant to their needs and existing employment opportunities.

The framework is simply a tool to ensure that the post-secondary education system achieves the two current strategic goals for the system:

- Goal 1: A Top Notch Post-Secondary System: to provide students with an accessible, affordable, high quality and relevant post-secondary education
- Goal 2: Economic and Social Development: to provide students with the skills knowledge for the workforce and the economy, and to respond to critical shortages in the labour market.

The performance measures that are at the heart of this accountability framework are keyed to assessing whether students achieve the outcomes they are expecting, in line with the two strategic goals. There are performance measures related to the quality of education, measures to assess whether the education students received was relevant to the employment market, and whether the knowledge and skills they acquired are useful on the job. The unemployment rate of graduates is a measure to ensure students have access to programs that link to employment opportunities. In short, this is a student-centred accountability framework that will encourage a focus on whether student's interests are served.

As well as providing direct benefits to students, post secondary education is a recognized contributor to economic, social and cultural development. While such general long-term societal benefits may be methodologically difficult to document in quantitative performance measures, they nevertheless need to be recognized. In particular, the conduct of research, which is a significant element of the mandate of particular institutions within the post-secondary system, generates substantial benefits with respect to innovation and economic development. The level of research capacity and its economic and commercial impact are susceptible to being quantified and form two critically important performance measures in the framework.

The accountability framework shifts the management of the system to ensure that the two strategic goals are front and centre. Management of the system will be improved because it is based on clear strategic goals and objectives shared by the institutions, the Ministry, and government. Government's priorities and public expectations will be more effective in steering the system, while recognizing the autonomy of individual institutions. The approach underlying the development of the accountability framework has been and will continue to be collaborative, thereby ensuring the success of balancing potentially diverse needs and interests. Further, the framework enables both the Ministry and the institutions to demonstrate more clearly "value for money" to the taxpayers of the province.

All these are important benefits of the framework, but improved management is a means to an end. It is the benefit to students and the results with respect to economic, social and cultural development that are the key purposes.

## **The Need**

A top-notch post-secondary education system that supports economic and social development is a priority for government. This will entail a system that is more coherent and integrated, enhances student choice, and provides a high-quality education for British Columbians. To support economic and social development, it must be a relevant and responsive system that addresses shortages in strategic skills areas, expands training and skills development, and expands research capacity in the province. To be sustainable, it must balance the costs and benefits of post-secondary education, and be the best use of taxpayer funds.

A supply of skilled, knowledgeable post-secondary graduates is important to our growing knowledge-based economy. Trained, skilled industrial workers are also key. As the “baby boom” generation begins to retire and needs replacement, demand for skilled graduates will increase, as will the demand for student spaces in the post-secondary system.

In addition to providing educational programs that address labour market and student demands, some post-secondary institutions also have a substantial research mandate. The returns on these investments in research with respect to supporting economic, social and cultural development are substantial. Research benefits include partnerships with other post-secondary institutions and industry, inventions, patents, license agreements, and spin-off companies. Together, these translate into significant contributions to innovation and development in the provincial economy.

The majority of jobs in the future will require some post-secondary education. In order to participate fully in this new economy, more British Columbians will require access to a broad range of educational opportunities. A well-educated population is also one that tends to experience better health, fewer social problems, and lower crime rates, and ensures vital communities with better citizen engagement. These kinds of long-term societal benefits, while methodologically difficult to demonstrate in a small set of performance measures, should not be ignored.

British Columbia’s post-secondary institutions have a broad range of excellent educational programs. However, resting on past excellence will not be adequate to respond to the pressures of the new era. Nor will the present approach to managing the system be adequate for the task of organizing and managing a post-secondary system that meets society’s escalating needs in the new era. The intensifying demand for post-secondary education at a time when public resources are constrained presents a significant challenge. Government funding for post-secondary education is being maintained at “steady state” for the next three years, and increased budgets are not anticipated.

A key part of the strategy to address this challenge is to develop an accountability framework that allows post-secondary institutions to work as interdependent parts of an integrated system to achieve strategic goals and priorities in an accountable manner. Again, the collaborative manner in which this accountability framework has been developed will facilitate greater system integration.

## **The Challenge**

Within a climate of constrained resources, the post-secondary system must produce the graduates with the abilities required by society.

The Ministry of Advanced Education's Service Plan identifies a number of strategic shifts designed to ensure the system remains responsive to society's needs. The two shifts most relevant to the accountability framework are:

- More accountability to taxpayers – to focus on success by encouraging the acceptance of explicit results-oriented accountability by the post-secondary system and to emphasize open and transparent decision-making and reporting.
- A coherent and integrated public system – to reshape public post-secondary education into a more coherent, integrated system with differentiated institutions working together in a complementary manner.

While British Columbia has many excellent institutions and programs, the system's capacity to respond to the needs of the future will be enhanced to the extent that institutions cooperate as interdependent parts of an integrated system. The Ministry is committed to exploring with the institutions ways to enhance cooperation, collaboration, and integration among institutions.

The management challenge facing the Ministry and the system is developing the capacity to be directed by a set of strategic goals and objectives. Responding to society's needs requires effective system planning to establish overall goals and objectives. Furthermore, planning can only be effective if all organizations within the system are accountable for fulfilling their responsibilities and reporting on their performance. The proposed accountability framework initiates such a performance management approach for the system.

## **The Opportunity:**

### **A New Approach to Managing the Post-Secondary System**

In this working paper, the Ministry of Advanced Education proposes an accountability framework that provides a foundation for effective management of the post-secondary system to ensure it can respond to the challenges of the 21<sup>st</sup> Century. The framework addresses government's commitment to openness, accountability, and demonstrating value to taxpayers.

The accountability framework will articulate what institutions are being held accountable for, how success will be measured, what reporting is required, and what implications follow from



performance. The operational details of the framework proposal are presented in Section III of the paper entitled “Accountability Framework Components”.

The framework shifts the focus of accountability towards results (outcomes) rather than inputs. Focusing on outcomes ensures that the system supports personal and intellectual development, serves society’s needs with respect to economic, labour market, social and community development, generates new knowledge and innovation, and provides a full range of accessible educational opportunities for students. It is generally considered that this approach will lead to more focused accountability for the institutions and the system as a whole.

The framework will encourage collaboration between system partners, support the enhancement of the quality of education, and demonstrate the open and accountable management of public resources and tax dollars. By providing a broad outline of strategic direction for the system, and by formalizing planning and reporting processes, the framework increases flexibility and recognizes autonomy in the institutions. Increased autonomy has been provided through such changes as block funding, deregulation of tuition, and elimination of ministerial approval of bylaws.

The main instrument of accountability in the framework is a set of performance measures to determine and report on successes in meeting goals and objectives. The *Budget Transparency and Accountability Act* now requires all ministries to develop rolling three-year Service Plans, and to report annually on the performance measures used for assessing progress towards its goals and objectives. Institutions will develop their own service plans and reports as a way to outline their accountabilities, the means for meeting them, and their success in achieving the plan.

Focusing management of the post-secondary system on explicit strategic goals and reporting performance on achievements will contribute to:

- Enhanced collaboration between the Ministry, institutions, and system partners. Clarifying the accountability relationships and determining what is expected from each partner will lead to increased effectiveness in managing the system.
- An effective means for continuously improving the quality of post-secondary education. The framework can be used to improve access to and the relevance and responsiveness of the system.
- The ability to demonstrate that taxpayers’ money is being well spent.

How the framework will address these challenges is illustrated in the following way:

Challenge	Opportunity	Intermediate Benefits (Impact on Management of the System)	Long-Term Results (Benefits)
While resources are constrained, the post-secondary system must produce the graduates with the abilities required by society	An accountability framework will create planning, assessing and reporting processes to guide the post-secondary system in the achievement of strategic goals and objectives	A more effective post-secondary system: <ul style="list-style-type: none"> <li>➤ Stronger linkages to government's strategic goals and objectives</li> <li>➤ Focus on results, primarily related to student outcomes</li> <li>➤ Performance incentives for institutions</li> <li>➤ Effective use of budget resources</li> </ul>	<ol style="list-style-type: none"> <li>1. Promote a more efficient and integrated post-secondary education system</li> <li>2. Enhance student choice</li> <li>3. Improve quality of education</li> <li>4. Balance the costs and benefits of post-secondary education</li> <li>5. Address shortages in strategic skills areas</li> <li>6. Expand training and skills development</li> <li>7. Expand research capabilities in the province</li> </ol>

## II. The Accountability Framework Initiative

This section of the paper traces the development of the framework to date and identifies its scope. It also sets out in detail the components of an accountability framework and what the Ministry of Advanced Education is proposing.

### a) Development of the accountability framework

The Ministry's 2002/03 - 2004/05 Service Plan commits the Ministry to establish an accountability framework for the post-secondary system in time to synchronize with government's planning, legislative, and budgetary cycles for the 2003/04 fiscal year.

During the past months, there have been a number of formal and informal discussions regarding the shape of an accountability framework. The Minister has broached this idea with governing Boards, and Ministry staff had discussions with a small group of Presidents, broadly representative of the different sectors in the system, and a number of informal discussions and briefings with a variety of groups within the post-secondary system.

The Ministry has also worked intensively with a group of Institutional Research Directors to review the proposed performance measures, discuss related methodological and data collection considerations, and make recommendations on an on-going basis with respect to the set of performance measures.

Accountability frameworks and the use of performance measures in post-secondary are current in an increasing number of jurisdictions, so there are many models to learn from. The Ministry has researched various jurisdictions to identify best practices, as well as any pitfalls to be avoided, and has investigated the approaches used to identify common design elements. Similarly, there is a pool of knowledge regarding performance management within our post-secondary system, which has been tapped for useful advice. No one external model is best: those features most applicable and workable in the British Columbia environment should be considered.

The Ministry is committed to ensuring ongoing participation and collaboration of system partners in the evolution of the framework. Provision is made for the framework to be reviewed and evaluated periodically, leading to continuous improvement.

## **b) Scope**

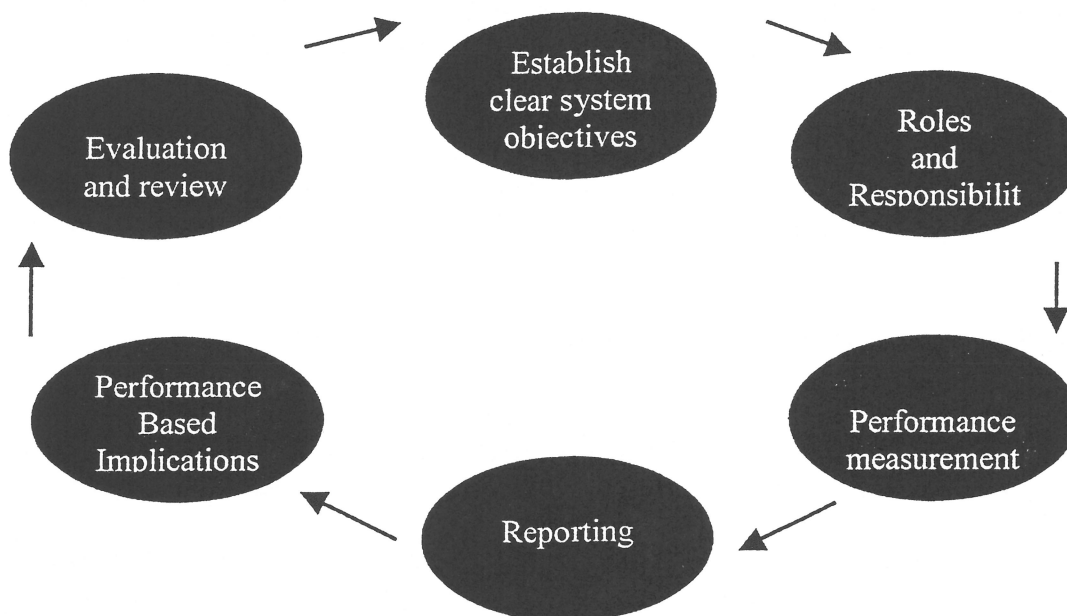
Accountability is a function of delegated responsibility and governance. Accountability relationships and determining which bodies are accountable for what and to whom mirror the structure of authority within government and the flow of public funds.

Hence, the scope of the initial accountability framework is proposed to encompass all public post-secondary institutions and the Ministry. Internal Ministry accountabilities and internal management priorities and processes, such as human resources and financial administration, will not be included. Post-secondary agencies and those private post-secondary institutions whose students access public student financial assistance may be included in future phases of the framework.

While private institutions will not be included in the initial framework, they will be subject to other appropriate accountability mechanisms. The government has announced replacing the Private Post-Secondary Education Commission with a cost-recovery, self-regulating industry board for the private training sector. The *Degree Authorization Act*, expected to come into force in early 2003, establishes a mechanism for private institutions and public institutions from other jurisdictions to confer degrees in British Columbia once the degree program proposal has undergone a quality assessment process and secured Ministerial consent. An administrative process for scrutinizing the performance of private institutions is currently under discussion.

### III. Accountability Framework Components

An accountability framework is a structure under which the key elements of service planning, performance measurement, and reporting are drawn together and integrated. It includes the accountability mechanisms relevant to managing the post-secondary system and encouraging performance. A well-designed accountability framework will also increase the integration, coordination, and synchronization of the existing data-collection and analysis activities, thereby improving efficiencies in these activities.



In essence, the accountability framework focuses on strategic goals and core business for the post-secondary system, and assesses the effectiveness of the system in achieving those goals through performance measurement and reporting. It focuses on post-secondary education as a coherent, integrated system, while recognizing the respective mandates of different institutions within the system.

The accountability framework is comprised of six components, constituting an accountability cycle. It begins with the setting of clear strategic goals and objectives and the allocation of responsibilities for achieving the goals and objectives to various organizations and bodies in the system. Performance measures are established and data collected in order to assess the success of the system and institutions in achieving the goals. Processes are established for regular reporting on those performance measures. In order to be effective, this performance information is used in decision-making and has an impact.

Finally, the framework itself is subject to periodic review and assessment as to whether it is providing useful and relevant performance information, and contributing to the improvement and enhancement of the quality of post-secondary education.

Aligning management systems is part of operationalizing the framework and will be considered in the implementation plan. The extent to which the framework facilitates this alignment will be part of the evaluation and review process.

### **a) Strategic Direction and System-Level Accountability**

Accountability is the reporting on responsibilities conferred. Hence the first question that arises is what are the goals and objectives for which the system as a whole and the individual institutions within it will be held accountable? Secondly, what are the processes that identify those goals and transmit them to various institutions in the system?

The government is moving to improve the integration and coordination between its overall strategic planning and that done within each Ministry and system partners. Strategic direction is expected to cascade from government's strategic plan to the Ministry Service Plan and then to the institutions.

#### **Specifying System-Level Accountability**

Jurisdictions have typically chosen between two approaches to provide strategic direction to the post-secondary system and ensure system-level accountability. Either the Ministry provides direction within its own business plan, or a plan is developed specifically for the system.

Given the timeframe, and the emphasis on integrating planning and accountability around government's priorities, providing direction to the system through the Ministry Service Plan is proposed, at least for the first phase of the framework. Using the current Service Plan for strategic direction also involves using current goals and objectives, as well as the performance measures as reproduced in pages 15-23 of the paper.

Adopting this approach is evolutionary, as the Ministry is already required to develop an annual three-year Service Plan that identifies strategic direction for the system and reflects current government priorities. While the Ministry is taking the leadership role that system partners expect, consultation with system partners in future service plan development will enhance the strategic direction. Institutional input and the knowledge and expertise in the system will provide guidance for future evolution of the framework.

#### **Vision**

The Ministry's strategic goals and objectives flow from the vision articulated for the provincial post-secondary education system: "A province where all British Columbians have affordable access to the best possible, technologically advanced, integrated and accountable post-secondary education system."

## Ministry Goals and Objectives

### *Goal 1 A Top-Notch Post-Secondary Education System*

*To provide students with an accessible, affordable, high quality and relevant post-secondary education.*

#### STRATEGIC OBJECTIVES

1. Promote a more efficient and integrated post-secondary education system
2. Enhance student choice
3. Improve quality of education
4. Balance the costs and benefits of post-secondary education

### *Goal 2 Economic and Social Development*

*To provide students with the skills and knowledge for the workforce and the economy, and to respond to critical shortages in the labour market.*

#### STRATEGIC OBJECTIVES

5. Address shortages in strategic skills areas
6. Expand training and skills development
7. Expand research capabilities in the province

## b) Roles and Responsibilities

### Specifying Ministry Accountability

The Minister's accountability is identified in a service letter from the Premier. The Ministry is required to produce an annual Service Plan that articulates Ministry responsibilities, sets goals and objectives, and identifies performance measures to assess success in meeting those goals and objectives. It is also required to report annually in an Annual Service Plan Report, which in symmetrical fashion, is based upon the goals, objectives and performance measures set out in the previous Service Plan. The plans and reports are tabled in the Legislature and must be made public.

### Specifying Institution-Level Accountability

Incorporating the strategic direction from government is the initial step in the accountability cycle. The previous section addressed system-level accountabilities and how the Ministry's Service Plan and Service Plan Report will be utilized as the instruments to identify strategic

goals and report on them. Accountabilities also devolve to the institutional level, and how they are addressed is the subject of this section.

Accountabilities must complement the roles and responsibilities of partners in the system. In specifying these accountabilities, government's expectation that the system operate as an integrated, coherent system is an underlying principle. However, this more integrated system is also expected to remain a heterogeneous one. Institutions are differentiated in terms of their mandates, strategic goals and objectives, mix of programs, community demographics and needs, and other circumstances, and the framework contains the flexibility for institutions to develop goals and objectives appropriate to this variety. By identifying institutional goals and objectives which also complement system level goals, institutions will be fulfilling the expectation that they act as interdependent, but differentiated, parts of a coherent system that serves student needs.

The accountability framework, together with other initiatives of government, is part of a new approach to managing the system. These initiatives balance autonomy and accountability through shifting the focus of accountability away from inputs, activities, and processes, and towards results. The focus on results is consistent with, and indeed encourages, institutional autonomy. Tuition has been deregulated, block funding instituted, the non-degree program approval process will be eliminated, and the degree approval process made less cumbersome. The accountability framework complements these changes, and recognizes the capacity for institutions to operate autonomously.

A second significant aspect of autonomy is the recognition of institutional differences, and the different local and regional contexts and labour market realities in which the institutions operate. As a general principle, institutional differentiation leads to a wider range of choices and opportunities for students. Institutions have the opportunity to develop strategic directions and goals relevant to their unique circumstances, and reflecting regional and community needs and priorities, while remaining within their mandate. Institutions also have the autonomy to concentrate on those things for which they have demonstrated excellence, and those things that are of particular relevance to the needs of their communities or the needs of particular groups of students.

Within the framework will be the means for the Ministry to articulate accountabilities to the institutions, and for the institutions and Ministry to articulate accountabilities to the public. In both cases, there must be clear linkages with the strategic direction of government, and transparency and openness to the public.

### **Budget and accountability letters will be used by the Ministry to articulate institutional accountabilities**

Currently, institutional accountabilities are articulated in a budget letter, and for most institutions, they are also reflected in their strategic planning documents. The framework will enhance the linkage of institutional plans with overall system accountabilities.

The expanded budget and accountability letter will be provided annually from the Ministry to each institution, and sets out Ministry priorities and expectations regarding system goals, specific



institutional goals, and performance and funding levels for the coming year. Budget and accountability letters will be informed by the strategic direction expressed by the goals and objectives of the Ministry's Service Plan and will also be linked to each institution's service plan. There will be provision for institutional input into finalizing the letter.

It is anticipated that the budget letters will consist of two parts: common elements, deliverables and performance measures that would apply to all institutions; and, specific elements unique to each institution. This latter part ensures institutional priorities and mandates are included, and provides opportunities for the context and circumstances of individual institutions to be acknowledged and accommodated.

In practice, the letter might include:

- The traditional aspects of the budget letter
- Performance measures and targets
- Reporting requirements for a service plan and service report
- Implications

The budget and accountability letters will be finalized in consultation with institutions and will include a discussion around the resources available to achieve the deliverables. Institutions would want to ensure that their unique missions and mandates are appropriately reflected. Budget letters will be made available and accessible to the public through posting on both the Ministry and institution web sites.

### **Institutional service plans will articulate institutional accountabilities to the public**

All institutions will develop annual three-year service plans or strategic plans as the means by which they articulate their accountabilities, and how they will deliver on those responsibilities, to the Ministry and the public. The term service plan, chosen to reflect governmental practice, refers to a strategic plan which also includes some level of operational planning detail with respect to programs and levels of service the institutions intends to deliver.

These plans should align with and complement government's strategic direction. However, institutions will have the flexibility to develop their service plans and include additional material to meet institutional needs and expectations. For example, institutions might use their plan to complement government's strategic direction by developing goals and objectives that may be unique to the institution, and reflect that institution's program mix, areas of excellence, or its particular mandate and community.

The guidelines for institutional service plans might identify such components as:

- Environmental scan, identifying external trends impacting the institution
- Internal scan, including findings from program and institutional evaluation activities
- Statement of goals and objectives
- Linkages of institutional goals and objectives to Ministry strategic goals and objectives
- Performance measures and targets



- Reflect an outcomes orientation as much as possible
- The service plan should be accessible to the public.

### **c) Performance Measures**

Traditionally, the focus of accountability in the public sector has been on compliance with statutory authority and financial accountability through appropriate financial management and accounting procedures. Through the accountability framework, government is adding accountability for results as a way of assessing whether shared goals and objectives are being achieved, whether public expenditures are effective and providing “value for money”, and whether public sector organizations are performing well.

A system of performance measures is central to this approach. Within an accountability framework, performance is assessed by performance measures that track progress achieved toward identified goals and objectives. The Ministry has a legislated requirement to identify and report on performance measures in its annual Service Plan and Report, and the accountability framework extends this same requirement to the post-secondary institutions.

The logic of performance measurement aligns goals and objectives to outcomes, through the measurement of Areas of Performance Interest. Performance measures can focus on inputs (measures of resources), processes or activities, outputs (measures of goods and services provided) or outcomes (measures of results). As there are accountabilities that are most constructively considered at the system level, others that are more appropriate to a particular sector, and still others at the institutional level, a variety of performance measures need to be developed with the appropriate breadth of scope.

### **Developing Performance Measures**

The starting point for the performance measures for the first phase of the framework is the relevant performance measures contained in the Ministry Service Plan and institutional budget letters. Performance measures from the Ministry Service Plan that specifically relate to areas outside the scope of the framework were excluded. Specific initiatives undertaken by post-secondary institutions in accordance with Ministry guidance or policy, which were included in the institution budget letter, were included in the framework.

Through consultation, Ministry and system representatives refined these Service Plan and budget letter measures, and included additional measures that were considered to be priorities relevant to the stated goals and objectives. This working group applied recognized criteria for good performance measures, including measurement validity and reliability and clear data definitions. In all, the proposed performance measures for the first phase of the framework include: 10 measures from the Service Plan, three measures from the institution budget letters, and nine measures developed through consultation to date.

## Consistency with Key Education Principles

Accountability in post-secondary education can be categorized by the following key education principles:

<b>1. Capacity</b>	The post-secondary system is of sufficient size to meet the demands of the province.
<b>2. Quality</b>	The post-secondary system is of sufficient quality to meet the requirements of students, employers, and citizens.
<b>3. Comprehensiveness</b>	The post-secondary system is relevant and responsive to the needs of the province by providing the appropriate scope and breadth of education programs.
<b>4. Efficiency</b>	The post-secondary education system is able to deliver education programs to students in a timely and efficient manner.
<b>5. Accessibility</b>	All citizens have equitable and affordable access to post-secondary education.

All performance measures used in post-secondary accountability frameworks are linked to one or more of these key principles. The following table shows how the proposed measures for the accountability framework are distributed among the key education principles in comparison to other jurisdictions.

### *Performance Measures by Principles and Selected Jurisdictions*

KEY EDUCATION PRINCIPLE	B.C.	Alberta	Ontario	Quebec	Oregon
<b>CAPACITY</b>					
System Capacity (Funded Student Spaces)	X				X
Space Utilization	X				
<b>QUALITY</b>					
Learner Outcomes (Quality Enhanced)	X	X	X	X	X
Employability (Quality Enhancement)	X	X	X	X	X
Research (Research Capacity)	X			X	X
<b>COMPREHENSIVENESS</b>					
Responsiveness (Address Skill Shortages, Trades and Apprenticeship Training)	X		X	X	X
Flexibility				X	
<b>EFFICIENCY</b>					

KEY EDUCATION PRINCIPLE	B.C.	Alberta	Ontario	Quebec	Oregon
Graduation (Graduation Rates)	X	X	X		X
Integration (Transferability)	X			X	X
<b>ACCESSIBILITY</b>					
Access	X		X	X	
Affordability (Equitable cost sharing)	X	X	X	X	

## Comparability of Performance Measures Across Jurisdictions

While performance measurement is the core of most systems of accountability, the number of measures used and the specific definition of each measure is dependant upon the role and purpose of the measure within the context of educational delivery in each jurisdiction. The number of measures can range from as few as seven to as many as 37. The number of measures that are appropriate for a framework depends upon the level of accountability required.

Some common themes among different jurisdictions include:

- Most jurisdictions use between 10 and 15 core measures;
- Most measures are results or outcomes based; and,
- Most jurisdictions recognize differences among post-secondary education sectors (i.e. university and college) by identifying some different measures for each sector.

Alberta Learning Business Plan for 2002-2005 used 11 core measures by which to determine institutions' performance in relation to ministry and government's strategic goals. In addition, the Alberta government collects data from institutions on 22 Key Performance Indications. In its most recent business plan (2001-2002), Ontario identified 15 performance measures for its post-secondary system.

Some of the issues associated with comparing the data outcomes of performance measures between jurisdictions include:

- Differences in the scope of the measure. For example, some jurisdictions include private and public institutions in their measure, while others restrict measurement to one or the other.
- Differences in how a measure is defined. Education programs differ between jurisdictions. What is considered a diploma credential for a program in one jurisdiction may not be so in another; consequently, comparing the numbers of diplomas between the two jurisdictions would be misleading.
- Differences stemming from data collection and storage. For example, client satisfaction measures require data that can only be obtained through surveys. How the survey is

conducted, who is contacted, and what questions they are asked will all impact the validity and reliability of the resulting information. While all jurisdictions collect data on student satisfaction, there is no consistency between surveys with regard to how the surveys are conducted (telephone/in-class survey), who is contacted (graduates/former students), and when they are surveyed (six months/two years/five years after the program). While a general, superficial comparison among surveys is possible, the data are not technically comparable.

The following sets out the goals, objectives, Areas of Performance Interest and proposed performance measures for the accountability framework. The table shows the linkages among strategic direction, key education principles, and the measures that have been selected on that basis. Included are preliminary targets (at the system level). The last two columns indicate the source of the measure and whether the measure is comparable with other jurisdictions in Canada, particularly Alberta and Ontario.

## Goal 1: Top-Notch Post-Secondary Education System

To provide students with an accessible, affordable, high quality and relevant post-secondary education

Objective	Area of Performance Interest	Key Education Principle	Performance Measures	Rationale	Target	Source for Performance Measure	Compare with other jurisdictions (see legend at end of table)
Promote a more efficient and integrated post-secondary education system	Improve Graduation Rates	Efficiency	Number of degrees, diplomas, certificates awarded	Successful achievement of credentials by students reflects the capacity of the system to meet the demand of students for quality education and the demand of the economy for qualified graduates. Credentials awarded in relation to resources available demonstrate efficiency in education delivery.	Baseline: 2001/02 Increase	AVED Service Plan	✓
			BC public post-secondary system graduate rate	A measure of the net benefit of an expected increase in credentials awarded.	Baseline: 2001/02 Increase	Consultation with Institutional Research Directors	✓
	Encourage System Integration	Efficiency	Number of block & course transfer agreements	Indicates the opportunity available to students to transfer earned credit between public institutions in BC.	Baseline: 2001/02 Increase	AVED Service Plan	✓
			Student satisfaction with transfer	Provides a learner centred evaluation of system efficiency and effectiveness in facilitating transferability of credit between institutions.	Baseline: 2002/03 Maintain	Consultation with Institutional Research Directors	✗

Objective	Area of Performance Interest	Key Education Principle	Performance Measures	Rationale	Target	Source for Performance Measure	Compare with other jurisdictions (see legend at end of table)
Promote a more efficient and integrated post-secondary education system	Access to Developmental Programs	Access-ibility	Number of student spaces in ABE/ESL/ ASE	Indicates the commitment by institutions to provide developmental education programs to students in accordance with Ministry policy.	Baseline: 2001/02 Maintain	Institution Budget Letters	✗
	Participation in Post-Secondary Education by Aboriginal Students	Access-ibility	Total number and percent of student population that is aboriginal	Participation in further education by aboriginal students is a key strategic priority for government and post-secondary institutions in BC.	Baseline: 2002/03 Maintain or increase	Consultation with Institutional Research Directors	✗
	System Capacity	Capacity	Total student spaces	Indicates actual system capacity and allows comparison to intended system capacity	Baseline: 2001/02 Increase by targeted amounts	Institution Budget Letters	✓

Objective	Area of Performance Interest	Key Education Principle	Performance Measures	Rationale	Target	Source for Performance Measure	Compare with other jurisdictions
Promote a more efficient and integrated post-secondary education system	Space Utilization	Capacity	Facility utilization for education activity	Maximizing utilization of institution facilities for education activity is a government strategic priority.	Baseline 2000/01  Increase delivery between May & August	Institution Budget Letters	✓/x
Enhance student choice	Expanded Access for Students to On-Line and e-merge/ BCcampus Initiatives	Access-ibility	Number of student spaces in on-line learning	On-line learning programs provide increased access, flexibility and choice for students pursuing post-secondary education.	Baseline: 2001/02 Increase by targeted amounts	AVED Service Plan	x
Improve quality of education	Quality Enhancement	Quality	Student outcomes – skills gained	Student's assessment of the degree by which their program allowed them to gain identifiable and tangible skills is a recognized proxy measure of the level of quality in education programs in BC.	Baseline: 2002/03 Maintain/ Increase	AVED Service Plan/IR Directors	x

Objective	Area of Performance Interest	Key Education Principle	Performance Measures	Rationale	Target	Source for Performance Measure	Compare with other jurisdictions
Improve quality of education	Quality Enhancement	Quality	Student satisfaction with education	Quality is in part reflected by the value students place on their overall education experience.	Baseline: 2002/03 Maintain/ Increase	Consultation with Institutional Research Directors	✓/x
			Student satisfaction with quality of instruction	Learner centred assessment of how education programs are instructed is a measure of the quality of program delivery in BC.	Baseline: 2002/03 Maintain/ Increase	Consultation with Institutional Research Directors	x
	Ensure relevance through enhancing student employability	Quality	Student assessment of usefulness of knowledge & skills in performing job	This measure reflects the student's assessment of the knowledge and skills they gained in relation to the demands of their subsequent employment.	Baseline: 2002/03 Maintain/ Increase	AVED Service Plan/IR Directors	x
		Quality	Student outcomes – unemployment rate	One expected outcome of post-secondary education by students and society is the successful transition to the labour force.	Baseline: 2003/04 Maintain/ Decrease	Consultation with Institutional Research Directors	✓/x



Objective	Area of Performance Interest	Key Education Principle	Performance Measures	Rationale	Target	Source for Performance Measure	Compare with other jurisdictions
Balance the costs and benefits of post-secondary education	Ensure Education Costs are Shared Equitably	Access-ibility	Percent of graduates with debt & ratio of average debt to average income after graduation	This measure reflects the cost impact and net financial benefit of post-secondary education for students.	Baseline: 2002/03	Consultation with Institutional Research Directors	✓/x

## Goal 2: Economic and Social Development

*To provide students with the skills and knowledge for the workforce and the economy, and to respond to critical shortages in the labour market*

Objective	Area of Performance Interest	Key Education Principle	Performance Measures	Rationale	Target	Source for Performance Measure	Compare with other jurisdictions
Reduce short-ages in strategic skill areas	Increase Graduates From Programs Addressing Skill Shortages	Comprehensive-ness	Number of computer science, electrical and computer engineering student spaces	The Ministry works with institutions to address identified skill shortages in high technology areas.	Baseline: 2001/02 Increase by targeted amounts	AVED Service Plan	X
			Number of social/child protection work student spaces	The Ministry works with institutions to address identified skill shortages in social work and child protection areas.	Baseline: 2001/02 Increase by targeted amounts	AVED Service Plan	X
			Number of RN's, LPN's and RCA and other Allied Health student spaces	The Ministry works with institutions to address identified skill shortages in health care.	Baseline: 2001/02 Increase by targeted amounts	AVED Service Plan	X

Objective	Area of Performance Interest	Key Education Principle	Performance Measures	Rationale	Target	Source for Performance Measure	Compare with other jurisdictions
			Number of medical school student spaces	The Ministry works with institutions to address identified skill shortages in health care.	Baseline: 2001/02 Increase by targeted amounts	AVED Service Plan	X
Expand training and skill development	Increase General Trades Training and Apprenticeship	Comprehensiveness	Number of entry level trades training (ELTT) spaces in institutions	The Ministry works with institutions to increase general trades training and apprenticeships. The number of training spaces indicates the capacity of the industry training system to meet the demand for skilled workers.	Baseline: 2001/02 Increase by targeted amounts	AVED Service Plan	X
Expand research capabilities in the province	Strengthen the Provincial Research Capacity	Quality	Federal/Provincial funding support for research	The Ministry supports post-secondary institutions mandate to conduct original research in all areas of knowledge. This is a measure of public institutions success in attracting sponsored research funding.	Baseline: 2002/03 Maintain/Increase	Consultation with Institutional Research Directors	✓

Objective	Area of Performance Interest	Key Education Principle	Performance Measures	Rationale	Target	Source for Performance Measure	Compare with other jurisdictions
		Quality	Number of licenses, patents, spin-off companies (under development)	This is a measure of public institutions success in attracting and converting sponsored research funding into economic and social tangible benefit.	Baseline: 2002/03 Maintain/ Increase	Consultation with Institutional Research Directors	✓/x

#### Legend Key for Comparability Symbols

- ✓ = A direct comparison is available as data is derived from common or compatible data sources.  
 x = Comparison is not possible as there is either no data or no equivalent data from other jurisdictions.  
 ✓/x = Comparison is possible but not recommended. Comparable data may be limited by technical and methodological concerns (e.g. differing data sources and collection processes). A cross jurisdiction comparison of this data may not be reliable or valid.

## Setting Targets

Targets will be developed once the performance measures are adopted and the data elements precisely defined. All performance measures included in the first framework should have three-year targets.

Targets may be either quantitative or qualitative depending upon the nature of the data for the performance measure. If quantitative, the target may be directional (increase, decrease, maintain) or a specific numerical value, percentage, or ratio. The value identified in the target may be either norm-referenced (compared to other institutions or a system average) or criterion-referenced (compared to a standard of acceptable performance). Finally, targets may vary in breadth of applicability: whether a given target applies to individual institutions, the institutions within a sector, all institutions, or the system as a whole.

It is important to distinguish between a target and the method used to measure against that target. For example, measures that are based on administrative data (i.e. counts of credentials, enrolment, FTEs) are less likely to be subject to statistical variability than measures based on survey results (student outcomes, satisfaction measures). As a result, it is simpler to measure whether a target has been successfully achieved for administrative measures, and the result is more intuitively obvious. Alternatively, the data outcomes for measures based on survey results are often stated in terms of a possible range (i.e. 75% +/- 3%). This can often result in instances where the stated measure appears to be less than the target but is in fact considered a successful achievement of the target based on statistical validity. Methods used to determine successful achievement are contingent upon how the measure has been defined and how data is collected for that measure.

It is proposed that at least for the first year, the targets be based on:

- Budget letter targets, if identified; and,
- Maintain or increase (or decrease in the case of unemployment rates) from baseline.

Methods of determining success will be developed through consultation with system partners. It is during these and other formal and informal discussions that the institutions can provide a context for their past results and for the likelihood of their success in meeting subsequent targets.

## Data Collection

Reporting on performance measures within the accountability framework is dependent upon two factors: data collection that is efficient and effective; and, an integrated and coordinated system of data management.

Evidence-based accountability through performance measures heightens the need for the Ministry and institutions to work together towards coordinating data management and rationalizing data-collection processes. A process will be established to report data at the institutional level for institution-level reporting, and to compile the data to produce system-wide figures. The Data Warehouse is intended to streamline the production of institutionally verified

reports for the college, university college, and institute sector on behalf of the institutions and Ministry.

## **d) Reporting**

Reports, and their data and analysis, indicate the progress being made by the system as a whole or by individual institutions on the goals and objectives set out in the planning process. They provide information to decision-makers in government, Ministry and institutions and they inform the public on how well government's priorities are being met and what kind of value for money is achieved.

### **i) System-Level Reporting**

Given that a system-level strategic plan is proposed for the accountability framework, a system-level report is a necessary companion piece. System-level reports provide an overview of the achievements of the system on a variety of initiatives and measures. Achievement is assessed in terms of progress towards meeting targets or benchmarks for each performance measure. Analysis is provided to explain progress and to place it in context.

For the first phase of the framework, the Ministry's Annual Service Plan Report, which is already a legislated requirement, will also serve as the system-level report. Collaboration and consultation with system partners will be built into the process of developing future service plans and reports, including future consideration of moving to a system-wide plan.

### **ii) Institution-Level Reporting**

Institutions will report annually on their accomplishments and on the progress they have made towards meeting their service plan goals and objectives. These annual reports will be submitted to the Select Standing Committee on Education, as well as to the Ministry, and will be publicly accessible.

For most institutions that already provide annual reports for their constituents, this approach formalizes this activity. While government will specify some guidelines for these reports, institutions would have the opportunity to broaden the report to meet their needs and to describe publicly their accomplishments in achieving their priorities and targets.

## **e) Performance-Based Implications**

Integral to an accountability framework are mechanisms to ensure that performance information links to decision-making and can bring about improvement. There are a variety of options to ensure that performance information has an impact.

## **i. Public Reporting**

Public reporting in itself can be a motivator to improve performance. Service Plans and Annual Reports, for both the system and for each institution, will give the government, the Ministry, and the public an understanding of the achievements in the post-secondary system and the successes attained by each institution.

It is anticipated that the public nature of reporting would motivate the Ministry and institutions to seek improvements and resolve any outstanding issues. On the other hand, merely requiring performance to be measured, reported and evaluated may not be sufficient to ensure that institutional and system performance is geared toward achieving specific goals, objectives, and targets.

Reporting is consistent with the phased-in approach currently proposed; reporting could be considered the first step in developing further implications, if they are considered necessary. It is proposed that reporting (subject to existing reallocation abilities identified below in “ii Incentive Funding”) be used in the first framework.

Moving beyond public reporting, there are a variety of ways in which performance information can be linked to financial mechanisms. Incentive funding and performance budgeting both link performance information to funding, but are clearly distinct. Incentive funding (more commonly called performance funding) provides an increment to the institutions’ funding, typically based upon a formula using performance on identified performance measures, but does not impact core funding. Performance budgeting, in contrast, uses performance information as one consideration amongst several in determining the institutions’ core budget. Typically it is not formulaic, but it does impact a significant portion of the institutions’ core funding. For example, in Quebec about 21% of core budgets are expected to be allocated on the basis of performance.

## **ii. Reallocation**

The Ministry has always reserved the ability to reallocate resources through the annual budget process. This consequence is a feature of current budget letters and is expected to continue.

The current proposal includes consideration of an incentive fund as an option. While retaining the Ministry’s historical role in readjusting budgets, the proposed framework does not include moving to a full performance budgeting model.

## **iii. Incentive Funding**

The goal of incentive funding is to encourage performance for post-secondary institutions through a financial incentive that is incremental, direct, automatic, and formula-based. What is currently proposed is to develop such an incentive with input from system partners and to defer until later any decision to implement. If or when an incentive fund is implemented, it would be phased in by “shadowing” for the first year to allow for review and refinement

Incentive funding would provide institutions with additional funds based on their performance against certain indicators or targets, which would be a subset of the performance measures used for reporting purposes. An incentive fund would be tied directly to key performance measures; success in achieving deliverables and meeting targets would translate into funds. In addition to public recognition, this approach ensures that there is a tangible incentive for making institutional improvements.

The implementation of incentive funding is also subject to the availability of incremental funds. The amount of funding would be expected to be equivalent to a small percentage of operating grants. Further, the development of an incentive fund would have to link with the planned funding mechanism review.

The following are the key assumptions underlying the development of an incentive funding mechanism in B.C. and are accepted “best practices”:

- The incentive fund would be based on the accountability framework, which reflects government priorities and goals.
- The incentive fund would supplement core government funding for post-secondary institutions and is not intended to replace it.
- The incentive fund would provide an amount equivalent to a small proportion of core funding, in order to minimize unintended effects and undesirable consequences and to preserve each institution’s autonomy and priorities.
- As part of the incentive funding model, a formula would be developed to adjust the amount of the award for the size of each institution in order to keep the award small in proportion to the institution’s budget. However, there may need to be a minimum threshold amount so that it still provides an adequate incentive to the smaller institutions.
- The incentive funding model would be formulaic, straightforward, and transparent in order to be clearly understood and to keep administrative costs low for both the government and institutions.
- Performance measures used in the model would be limited to a few selected carefully from those identified for reporting in the accountability framework.
- The primary focus of the performance measures would be on student outcomes and quality to avoid a broad focus with potential conflicts and to be more manageable.
- All types of public post-secondary institutions would be included together in a single incentive funding model.
- The incentive funding model would be developed to encourage continuing cooperation and coordination among institutions and to avoid stimulating too much competition.

## **f) Evaluation and Review**

The accountability framework will be periodically reviewed to determine whether it is effective in its purpose of benefiting students and furthering the goals of post secondary education. Evaluations and reviews of the framework will specifically gauge the utility and relevance of



performance information and its contribution to the improvement and enhancement of the quality of students' education.

The review entails potential work at a number of levels:

- Focused on selected key areas of performance interest, the framework assesses the performance of the post-secondary system. Periodic review should determine to what extent the framework is effective in this task, including evaluating the appropriateness of the set of performance measures.
- Assessment of the framework itself will also consider issues such as efficiency, effectiveness, and the appropriate design and implementation of components. This level of evaluation is concerned more with the framework itself and its components.
- A third area of focus is the linkage of the framework to other evaluation activities, including institutional evaluation and program evaluation, and their place within an integrated accountability system. The effectiveness of the performance measures in fostering improvement will also be considered. There should be a cooperative effort to ensure that there is appropriate coordination and follow-up to all the performance information that is collected and reported. Institutions will be encouraged to share "best practices" in terms of using assessment activities to bring about improvement.

## **IV. Implementing the Framework**

### **Typical Accountability Cycle**

In summary, what would a typical annual accountability cycle look like when implemented? Most readers will recognize that many of these activities are currently being done. What the framework does is to streamline and integrate them within an annual cycle that is clear for everyone.

#### **Ministry Service Plan (begun in September, tabled in Legislature in February)**

The Ministry will:

- Review and revise environmental scanning information
- Identify implications of government's strategic plan, and any shifts in plan
- Discuss emerging system priorities
- Revisit strategic goals and objectives
- Establish linkages to institutional service planning

### **Budget and accountability letters**

The Ministry will:

- Research data, factors, application, assemble environmental scanning information
- Consult informally with institutions as they develop their service plans and obtain information on institutional plans, goals
- Identify components, requirements, targets
- Draft letters, making sure government's strategic direction is reflected; discussion with each institution to fine-tune these letters
- Meet with each institution (January/February)
- Revise budget and accountability letters and send to institutions by end of February

### **Institutional Service Plans**

- Each institution will produce a Service Plan, including budget and accountability letter measures, plus additional goals, objectives, and measures the institution wants to highlight
- Identifies strategic goals and objectives, and how the institution proposes to go about accomplishing these goals
- Provided to Ministry, available to the public
- Timeline parallels that of the Ministry Service Plan; finalized after institution receives its budget and accountability letter

### **Reporting**

- Public reporting will be done by both the Ministry and institutions
- By legislation, the annual Ministry Report covering the past fiscal year must be tabled in the Legislature by August 31

### **Performance Implications**

- Data reported annually by institutions to Ministry and public; data feed into the Ministry's Annual Report and budget
- Impacts of performance information on system and institutional decision-making

### **System Participation in ongoing management**

Steering Committee

- Executive-level committee
- Might meet twice a year: once to review the previous cycle of the framework, once to "kick off" the next round
- Provide input into the model, process; monitor progress on implementation and deal with problems and issues.

Data and Performance Measure working group

- Review and refine performance measures; research target information

#### Evaluation Committee

- Identify best practices; link with institutional research evaluation activities

### *Next Steps*

This working paper outlines the plan of the Ministry of Advanced Education to initiate an accountability framework for the post-secondary education system. The Ministry welcomes feedback from institutions, groups and individuals within the post-secondary system on how this framework might be improved.

A brief discussion paper for broader public interest is available on the Ministry website and electronic response is invited at [www.aved.gov.bc.ca](http://www.aved.gov.bc.ca)

Responses to this working paper may be submitted by January 31, 2003, in a variety of ways:

- E-mailed to: [AVED.Accountability@gems3.gov.bc.ca](mailto:AVED.Accountability@gems3.gov.bc.ca)
- Mailed to: Attention: Bo Hansen  
Accountability Branch  
Ministry of Advanced Education  
PO BOX 9888 STN PROV GOVT  
VICTORIA BC V8W 9T6
- Faxed to: (250) 387-0878

# Tab 3



## **New Accountability Framework Performance Measures at UCC**

### **1. Number of Degrees, Diplomas, Certificates Awarded:**

"Credentials awarded in relation to resources available demonstrate efficiency in education delivery."

The acceptable performance band is  $\pm 3\%$  of baseline production on a three-year roll-through basis, baseline being 2001-02. If we rose above 3%, we'd have no complaints from the Ministry, but if we dipped lower than -3%, we might attract attention.

Maintaining production may be a challenge for UCC, given our flattening and perhaps even declining enrolments at first year level. In degree programs, we should hold steady; but in career tech diploma programs the 3% drop in enrolments in Fall 2002 may impact on our graduation rates in 2004; and the 10% drop in vocational enrolments will certainly convert to a lower certificate count in 2003. As well, UCC's response to the budget crisis of 2002--deletion of productive vocational certificate programs while protecting non-productive disciplines in the academic area-- may return to haunt it ( unless the new Administrative Assistant program produces more certificate awards than the four programs that were cut ( BOOK, BUSA, LEGA and MEDA).

### **2. Student Satisfaction with Transfer:**

This is an Outcomes-based measure; currently UCC has a high satisfaction rate with transfer (93%) and a low dissatisfaction rate (7%). No problems here.

### **3. ABE/ESL/ASE Access (Actual FTE):**

This measure needs to be monitored, as it fluctuates from year to year. For the 2001-02 baseline, our count was 601 FTE. Variables such as the re-introduction of tuition in ABE may affect future counts. "ESL" is only domestic ESL, not international.

### **4. Aboriginal Participation:**

UCC's official First Nations participation rate is 4.8% of the student body; unfortunately, the regional aboriginal population is 9.6% of the total regional population. So we are underachieving here. If we changed our admissions form to specify "Of aboriginal descent", instead of the current "First Nations" box, we might pick up those who do not think of themselves as "First Nations", eg. Metis, Non-Status Indians, Inuit, etc. This might improve our count, but I suspect we are always going to be below the regional ratio.

### **5. Total Actual FTE count:**

This will be compared to the target FTEs specified in the budget letter. We may be challenged to meet the 540 new FTE target set by the Ministry. See Heather's graphs for our projected shortfall.

## 6. Space Utilization:

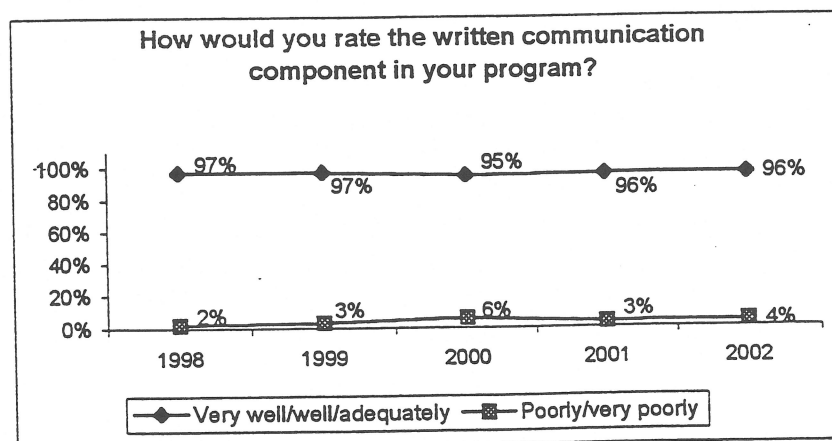
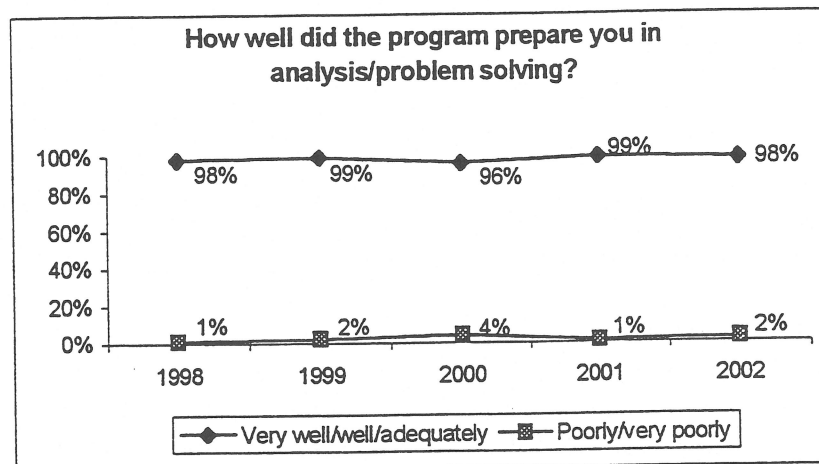
The target is 21% system average space utilization between May 1 and August 31. We're not going to be much help to the system on this item, as our Summer Session activity is less than 2% of annual educational activity—although we could improve this by factoring in any educational activity that runs beyond April 30 (e.g., vocational and some CT), and any that commences before August 31 (e.g. some vocational). Only base-funded activity counts—no international allowed.

## 7. Online:

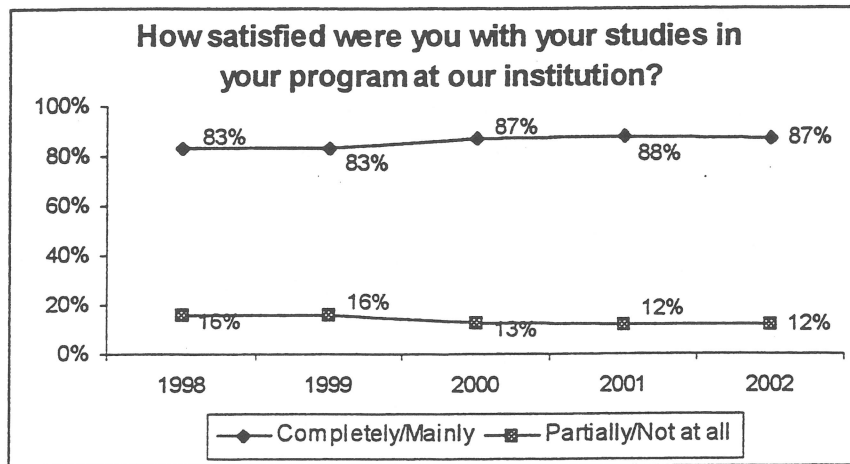
No problem.

## 8. Student Skill Gains:

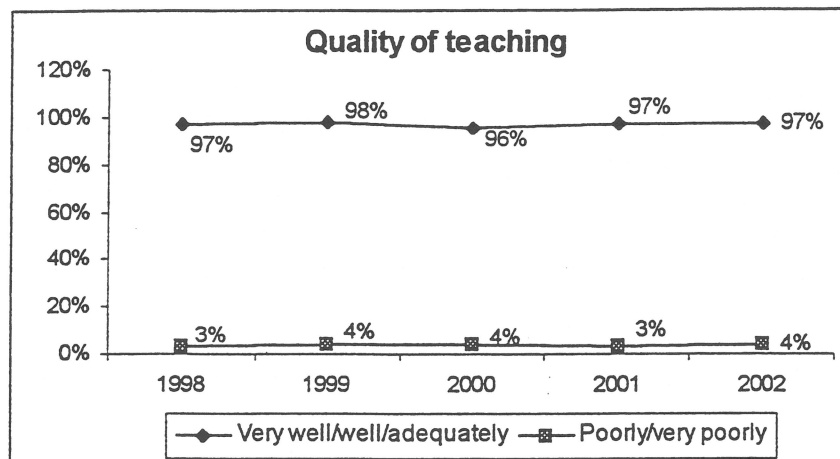
See attached charts. UCC is doing OK: the challenge will be to maintain these ratings in the face of larger class sizes and less personalized instruction. The baseline is 2002-03.



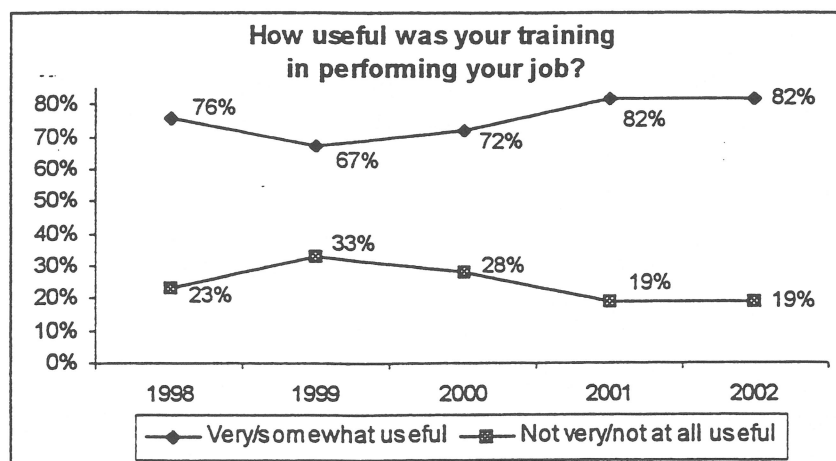
**9. Student Satisfaction with Studies:**  
Ditto.



**10. Quality of Instruction:**  
Ditto.



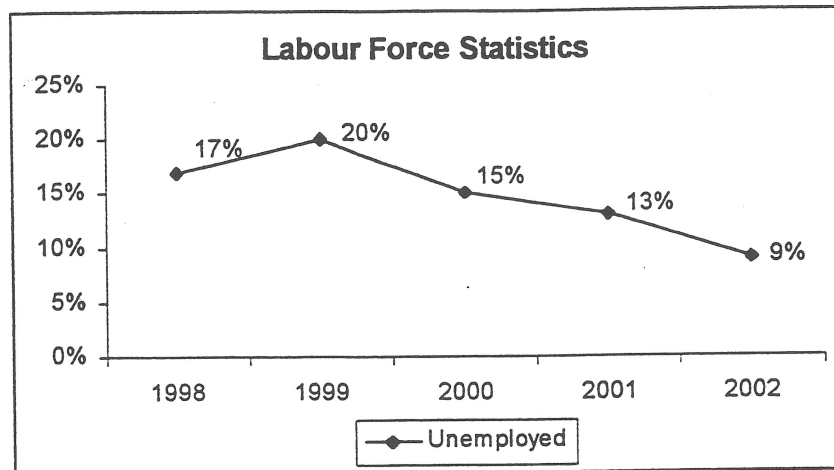
**11. Usefulness of Knowledge and Skills in Performing Job:**  
Ditto.





**12. Unemployment Rates:**

Baseline is 2003-04.



**13. Debt Ratio:**

This is essentially a system measure, but might be used to ensure that no institution inflates its tuition beyond system average.

**14. New Era targets: Computer Science and Engineering:**

89 new FTEs by 2005: can we do it? The clock is running.

**15. New Era: targets: Social Work Spaces:**

8 new FTEs by 2004. No problems anticipated here, unless Social Work ceases to be an attractive career.

**16. New Era Targets: Nursing and Health Sciences:**

139 new FTEs by 2005. Eminently do-able, given student demand.

**17. ELTT Actuals:**

An area of challenge for UCC, given its 10% drop in trades enrolments in 2002, and the ongoing ITAC/Son of ITAC fiasco. Baseline is 2001-2002 actuals.

**18. Federal/Provincial Funding for Research:**

Mainly the universities, but UCC needs to ensure that it is attracting the same amounts of federal money as the other university colleges, particularly Okanagan, and this is not happening at present.

**19. Licences, Patents, Spin-offs:**

Again mainly the universities, but this measure should be addressed by the AVP Research and our Director, Advanced Technology.

**Summary: Problematic Measures for UCC:**

- Degree, diploma and certificate count
- Aboriginal Participation Rates
- Actual FTE count in relation to targets
- New Era FTE targets in Computing Science and Engineering
- ELTT Actual FTEs

PREPARED BY

A. WATT



# Tab 4



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**DISCUSSION PAPER:**

**A New Model for Industry Training in  
British Columbia**

December 2002



Ministry of Advanced Education

A PDF version of this document is available on the Ministry of Advanced Education  
website at: <http://www.gov.bc.ca/aved/>

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## **A New Model for Industry Training**

### **EXECUTIVE SUMMARY**

This discussion paper provides an overview of why the province needs to develop a new model of industry training, and it outlines a framework for elements of that model which may be developed through different strategies. Key issues are identified and the principles that underlie a new model for training in British Columbia are articulated.

Government is seeking input to maximize the success of the new model, as this is not the first time industry training has undergone major change in the province. When the Industry Training and Apprenticeship Commission (ITAC) was created in 1997, similar needs were identified, among them the need for an industry-driven training system.

Despite its best efforts, ITAC was not able to implement the sweeping changes needed in British Columbia to make the province not only competitive but a leader in developing its resources. The government has promised a new era for British Columbia and is planning for workforce development to address current and projected skills shortages.

Decisions made about industry training now will affect not only current workers, but also future generations of workers. It is important we learn from past experiences. Change is needed, not for the sake of change, but to provide relevant training with the highest standards for our workforce, and to encourage youth to choose industry training as a career path.

Information on the public consultation process is outlined in this paper. Public input into the elements and implementation of the new model is important to ensure that all regions of the province are heard before final decisions are made. Your views are important and necessary to inform decisions that can make a difference.

### **PUBLIC CONSULTATION**

You may be reading this paper as part of a regional forum, as a document that has been



e-mailed or mailed to you, or on the Internet, as the paper is being posted to the Ministry of Advanced Education's Web site. Please feel free to share this paper with others who are interested and who may wish to inform the discussion underway about the new model of industry training.

Over the next two months, a series of regional forums will be held in key locations selected to promote shared perspectives and maximize the input to government about the proposed changes. The Ministry of Advanced Education will work with employers and business associations to select venues and provide information on opportunities to participate in the regional forums. For more information on these forums, or to download additional copies of this discussion paper, see the Ministry of Advanced Education's Web site at

<http://www.gov.bc.ca/aved/>

Whatever opportunity you have to provide input, your feedback is welcome and encouraged.

To provide input to this paper, please write, fax or email your comments to the following:

***Industry Training Branch Feedback  
Ministry of Advanced Education  
PO Box 9894 Stn Prov Govt  
Victoria, BC V8W 9T6***

***Fax: (250) 387-1365***

***E-mail address: AVED.ITBFeedback@gems2.gov.bc.ca***

Or respond on the Internet at <http://www.gov.bc.ca/aved/>

## **INTRODUCTION:**

In British Columbia, training for trades and occupations is done through post-secondary institutions and private trainers as well as in the workplace. Government has made a commitment to fundamental changes that will impact the Entry Level Trades Training (ELTT) programs formerly administered by the Industry Training and Apprenticeship Commission (ITAC). It also will reshape apprenticeship training in the province. ITAC is being closed down and will be replaced by a new model of industry training.

ELTT programs account for approximately two-thirds of the ITAC budget for program delivery. The remaining funds are used to support current apprentices' technical training requirements through a network of public and private training institutions and agencies. As well, ITAC worked to develop new trades and occupations to serve emergent needs of employers.

All of these programs and services will be reshaped into a new model that will be responsive to the needs of learners, employers and the market place. It will address current and projected skills shortages through timely and responsive training models.

Government's review of industry training identified a number of problems with the system administered by the ITAC:

- Variability of ELTT duration: two programs may offer the same training credit and yet differ in currency, quality and length.
- Lack of credit for ELTT toward apprenticeship training: a learner may take a program of up to 12 months in length without assurance that industry will give consistent recognition to the skills and knowledge gained; credit may be as little as 6-8 weeks of technical training and varies by employer and trade.

- The inability to meet employer needs for trades workers and address skills shortages. Employer needs identified included multi-skilling, specific skills sets to meet current employment openings, and increased opportunity to identify emergent needs and have training developed to meet them.
- Inflexible training methods based on time rather than competencies have been a barrier to innovation in training design and delivery.
- Many people drop out of their training program and fail to qualify to work in their trade or occupation. A significant investment of time and money may be wasted.
- Many learners have to start over again when they begin a new program or trade that overlaps the knowledge and skills they have already. These learners are less likely to be flexible in gaining new skills, and are less likely to complete training to the level of their personal goals.
- Many employers do not commit to the time-based system of apprenticeship that requires on-going training and close supervision for up to four or more years.
- Industry is not attracting young people; the average age of apprentices is 28, and many are in their thirties or forties before they complete their training.
- Lack of qualified workers is a continuing concern; half of the current apprentices do not complete their training to become qualified in a trade.

In short, the system of industry training is not able to respond quickly enough to the emergent and growing needs of British Columbia's changing economy and demographics. A more effective and efficient industry training system is currently under

development. It will be driven by the needs of industry and address skills shortages by facilitating a consistent supply of qualified trades workers.

The closure of ITAC is part of the transition to a new industry training model. The establishment of an Industry Transition Advisory Committee<sup>1</sup> (TAC) comprised of business, labour and education representatives was a first step. This committee has been meeting since April and has prepared the following schematic to describe its vision for a new training system and a governance structure for the system that can more responsively meet the needs of business and learners.

For a more elaborated overview of the key elements of the New Model of Industry Training, see Appendix A of this paper.

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<sup>1</sup> For more information on the Committee, see [http://www.aved.gov.bc.ca/industrytraining/Q\\_A\\_list.htm](http://www.aved.gov.bc.ca/industrytraining/Q_A_list.htm)

## THE NEW INDUSTRY TRAINING MODEL: *A COMPARISON*

<b>THE OUTCOMES</b>	
<b>New Model</b>	<b>ITAC</b>
Focused on outcomes, i.e. learners being employed.	Focused on inputs.
System will be developed for measuring outcomes.	No system available for tracking outcomes.
Full accountability for all major participants.	Lacked accountability.
<b>GOVERNANCE</b>	
<b>New Model</b>	<b>ITAC</b>
Industry Training Authority Board with corporate and fiduciary responsibility.	Board with stakeholder representatives.
Board decision-making is streamlined with a nine-member Board.	Board decision-making complicated; a 25-member Board; four stakeholder groups having individual vetoes.
CEO appointed by and accountable to the Board.	CEO appointed by government on recommendation of Board; reports to the Board.
Staff hired by CEO; small core group.	115 staff; public servants
Flexible advisory structure.	Large, highly structured trade advisory committees.
Interface with one Ministry, Advanced Education.	Interfaces with two ministries.
<b>THE TRAINING SYSTEM</b>	
<b>New Model</b>	<b>ITAC</b>
One training system.	Two training systems: entry level trades training and apprenticeship.
Multiple entry and exit points for learners.	Limited entry and exit points for learners.
Modular and competency-based training. Time-based training continues where appropriate.	Time-based training.
Tuition fees at approximately 15% of cost.	No or very low tuition fees for apprenticeship training.
Credentials with flexibility to facilitate additional training.	Credentials provided only on final completion.
Use of Red Seal certification continues.	Focus on Red Seal certification.
Emphasis on innovation and new delivery models.	Emphasis on the core business using traditional methods.
Focus on attracting secondary school students. Local flexibility to develop a variety of transition programs that may include technical training.	Secondary School Apprenticeship program comprises work experience only. CTC programs may offer some post-secondary training credit.
Utilizes full range of public & private trainers.	Focuses on public training institutions.
Multiple funding sources contemplated with the Board allocating the funds.	Virtually all provincial funding. Ministry of Advanced Education allocates funds.
<b>THE RISKS</b>	
<b>New Model</b>	<b>ITAC</b>
Puts additional responsibility on the learner to fund and for the learner to make employment connections.	Inflexible to changing market needs.
Puts additional responsibility on industry to define training need and employ learners.	Leaves much of employment need definition to training organizations rather than business.
Relies extensively on coordination of action being undertaken by the main participants.	Puts the coordination role in the hands of ITAC with the attendant costs.

## **ROLES AND RESPONSIBILITIES**

### **Government:**

Government will ensure the new model allows employers and learners across the province to participate and benefit, that regional economic development is encouraged and supported, and that the resources available are used in the fairest and best way. There is a continuing and necessary role for government in maintaining standards and credentials for provincial and interprovincial (Red Seal) trades. Government will also ensure that adequate labour market information is available and used appropriately to support human resource planning for development and delivery of industry training.

Integration of industry training as part of the broader education and training system of the province, including development of new diploma and applied degree programs for learners, will be supported and monitored by government

Programs developed to meet short-term needs must also develop long-term skill sets to have lasting value. Employers are expected to train where the need is so specific that there is no other company that will need or value the skills set – an example would be training to use equipment unique to that company. Public funds should support transferable skill development. Government plans to recognize these transferable skills through articulation of learning and credentials to increase training flexibility and attract more youth to trade and technical careers.

Post-secondary education institutions and trainers who deliver industry training will be encouraged and supported to develop integrated and “laddered” programs to the level of applied degrees. Learners may begin learning in the workplace or in a classroom and continue their learning in a variety of ways. More information on this element of the new model is provided later in this paper.

**Industry:**

Employers want to ensure that BC workers can meet the skills required by the demands of the economy. They want appropriately trained people to do the work at hand, and need ways to develop and recognize the specific skill sets which are needed for successful operation and expansion of their businesses.

Employers also need mechanisms for the skills and experience of workers to be accredited against provincial or interprovincial trade or occupational standards that have been developed with industry to reflect the needs of the workplace.

As government's role in the development and delivery of industry training narrows to a focus on maintaining provincial standards and credentials, industry's role will broaden to incorporate promotion and marketing of industry careers to youth and others who can help to solve skills shortages. Industry will also take a larger role in identifying training needs and working with training institutions to develop programs to meet these needs. Finally, employers and industry groups and associations will be expected to take a leadership role in strategic planning, including K-12 links.

Learners want assurance that skills gained in the workplace will be fairly compensated, and recognized both by BC employers and those in other provinces. They expect a fair and objective assessment of their skill set that can result in a credential, whether their training is school-based or on-the-job training. In the new model of industry training, learners will have more options to develop skills sets and more ways to train. They will be expected to choose and schedule their own training, as do other post-secondary learners, and they will be expected to develop a career plan to meet their education and career goals.

### **Trainers:**

Public and private trainers who deliver industry training will be expected to offer relevant programs, ensure employer and learner satisfaction, and to comply with the information and accountability needs of government and industry. They will be key to ensuring that training is changing to match changes in industry and technology that require new skills sets and current knowledge of workplace standards. As in other program areas, they will be expected to anticipate and respond effectively to the needs of learners and employers through collaborative planning processes aimed at developing an integrated post-secondary education system.

### **CHALLENGES**

British Columbia's economic future depends as much on the availability of skilled workers as it does on attracting new investment to the province. Qualified workers are needed to replace those retiring, as well as to fill job openings created by the economic expansion in the province. We must ensure that a lack of trained people does not become a barrier to economic growth, and that the training provided with public funds meets the needs of both employers and trainees.

The provincial government spends about \$70 million annually on industry training programs administered through ITAC, which oversees training for trades and technical occupations. Industry also contributes to training of employees in the workplace. Currently, there are 16,500 apprentices enrolled in the system, with another 14,000 trainees engaged in Entry Level Trades Training (ELTT) courses at public post-secondary institutions.

Despite this considerable investment of resources, the number of apprentices in traditional trade areas has not grown appreciably over the past five years, raising concerns that the next five years will leave British Columbia poorly positioned for prosperity through growth.



## **THE SOLUTION: A NEW INDUSTRY TRAINING SYSTEM FOR BRITISH COLUMBIA.**

The Transition Advisory Committee proposes the following as a mission statement for the industry training system: *To provide effective and efficient industry- focused training that meets the skill requirements of employers and career aspirations of learners in British Columbia.*

A new model for an improved, expanded and effective industry training system in British Columbia is currently being developed in support of this goal. The new model will be driven by business and will see costs for industry training shared by trainees and employers; public funding through government will not be the sole source of funding.

The evolution to a more flexible, innovative industry training system will begin immediately but will take place over time. The option for employers and their apprentices to use “traditional” apprenticeship training models will be retained as appropriate, but new mechanisms for skills development, for assessment of skills and knowledge, and more flexible ways to build to other credentials will be added.

Young people and their parents will be encouraged to recognize the real opportunities presented by trades and technical occupations. Employers and/or sector associations will actively engage with parents and the secondary school system to promote and market trades training and career opportunities.

## **KEY PRINCIPLES**

**These Key Principles Will Guide Program Development And Delivery In The New Model For Industry Training:**

- Industry problems are best solved by industry-developed solutions.
- A closer relationship between trainers and industry will result in better training that is relevant to the needs of industry, workers and learners. Trainers will have more responsibility for program and curriculum development and design, working directly with industry clients.
- Industry should determine the priorities for training to produce a highly skilled, employable labour force.
- The achievement of standardized competencies with appropriate assessment, recognition and crediting of these competencies will be a key element of the new model.
- An efficient and effective training system recognizes both formal and informal learning and practical experience; it is coordinated with the K-12 education system and the post-secondary education system to facilitate transition from school to work and to attract youth into areas of skills shortages which have well-paid employment.

## **THE DIFFERENCES – THE OLD SYSTEM AND THE NEW**

The new system will be recognizably different in how it responds quickly and appropriately to the changing needs of individuals, the labour market and emerging occupations. The needs of the workplace must have more influence on the type of training and credentials workers receive. This does not mean traditional occupations and credentials will cease to exist, but the system must be built in such a way to accommodate change when it is warranted.

To better understand how the new training system will look to employers and employees, consider the example of the carpenter trade. Under the old system, carpentry apprentices

were required to have a job before they could gain access to training. Once registered via an apprenticeship agreement, apprentices began a four-year, on-the-job training program that included four ITAC-scheduled sessions of in-school technical training, usually one session per year. They were also required to receive practical training in all facets of the carpentry trade. In order to acquire the skills and knowledge to achieve journeyperson certification, an apprentice employed by a *forming* contractor might be forced to quit their job to find work with a *framing* contractor and then change employers again to gain experience with a *finishing* contractor.

There was no opportunity under the old system for *progressive credentials such as forming carpenter, framing carpenter or finishing carpenter*. There was no opportunity either for apprentices to have access to training deemed part of another trade, even if those skills were required for an individual's job.

#### **THE NEW SYSTEM:**

Under a new, more flexible system, training will be realigned to match employment opportunities and there would be opportunities for training other than becoming an apprentice. Training for some trades and occupations may be expanded; in other areas, because of lack of demand, training could be downsized. New kinds of programs would be developed to meet the needs of employers. For example, programs that provide "up front" training will be developed. Trainers would be provided with the competency profile for the individuals to be trained and would develop the training needed to meet the standards and competencies identified in the training profile. Government will no longer determine the curriculum or develop classroom materials, but will be responsible for maintenance of current standards and development of new assessment standards linked to provincial and interprovincial credentials.

Within this framework, the person who wants to learn skills in the carpentry trade might register as an apprentice with an employer to learn some of the trade skills. Once learned, these skills can be recognized by 'incremental' or specialized credentials and

these credentials will be recognized as progressive steps to acquire Interprovincial “Red Seal” credentials. In the example above, learners could get a certificate as a *framing carpenter* or a *level one carpenter* and could eventually gain a Red Seal credential as a carpenter if they want to progress to this level.

Modularization of current trades curriculum and the implementation of theoretical and practical assessments will allow earlier receipt of credentials tied to specific skill sets. As well, if the carpentry apprentice has skills and knowledge that are also needed for the roofing trade, there would be articulation so that they do not start all over again if they want to learn that trade.

On-the-job training through apprenticeship will not be the only way to get trained. Trades training and training for related occupational credentials will be provided by training institutions and through private trainers, and by public-private partnership arrangements. Learners will be able to enroll in co-op programs, which combine classroom and work experience, and in programs which offer dual credit – graduates can gain a trades credential and also receive certificate, diplomas and applied degrees, building their credits in a cumulative way. In their program, they will receive credit for what they have learned in the workplace, as well as what they learn in the classroom.

As do other students, these learners will have more responsibility to arrange their education and training and greater choice of who their trainers will be. Learners will pay tuition fees for training to public and private trainers and will enroll at the institution or trainer of their choice. They will review course calendars provided by training institution, most of which are now on-line, to make choices. Many institutions now register students on-line.

Some programming will be provided on-line. For example, the theory portion of training for a particular trade might be delivered via distance learning anywhere in the province. In other cases, learners will have the option to take technical training in the workplace, in the evenings and in other innovative ways. If there is learner demand, a program can be

developed to meet the needs of a specific group or type of learner. Employers will have the opportunity to identify what training is needed for their employees and how, where and when it should be delivered.

The province is not abandoning traditional apprenticeship. British Columbia will continue to be an active participant in developing national trade standards and the Red Seal Certification program. Once ITAC offices close, employers and apprentices will register training agreements through an Internet-based, self-registration system

The new Internet self-registration system is not a system for enrolling for training at post-secondary institutions and trainers. Online registration for post-secondary programs is available through most public post-secondary institutions. The self-registration system is not intended to schedule individual apprenticeship technical training as was previously done by ITAC.

The new system is intended to allow people to register themselves as apprentices, and once registered, access, review and update their employment record and print the record. It will allow employers to access training records for their apprentices, validate and update their list of apprentices, and it will allow for data entry of technical training the apprentice has taken in the workplace and in school. This could include a record of specific competencies, and industry training credentials.

Red Seal and Provincial Trade exams will continue to be available. Options for invigilation of written exams include delivery of these services through institutions, by Government Agents, or delivery via contract with one or more agencies through a Request for Proposals process.

New practical assessments, tools and processes will be developed. Other countries and some provinces have implemented practical assessments to allow learners to demonstrate what they know and can do. It is anticipated that these types of assessments will be implemented in British Columbia as additional elements of the assessment and

examination system to be used as needed for credentials or to establish credit towards a credential. Learners who have completed traditional apprenticeship programs will continue to write Red Seal exams, but new assessments will also be available to reflect competencies requested by employers.

## **DEVELOPING THE NEW MODEL**

Several steps to develop a new industry training system have already been taken. One of the first was the appointment of the TAC in April 2002. The committee comprises business, labour and education representatives. TAC has proposed the establishment of an *Industry Training Authority*, which will be a stand-alone agency, responsible to government. The *authority* will comprise a nine-person board of directors as well as a small management team and staff responsible for program administration and client services formerly delivered through ITAC.

The *authority* would be established as an agent of government through legislation that would outline its mandate and powers for governance of industry training and apprenticeship. As proposed, the *authority* would manage program development and delivery, provide all client services, have responsibility for allocation of funding, and select trainers and contractors to deliver programs and services. The authority would also deal with complaints and appeals regarding apprentices, employers and programs under their jurisdiction. Government would retain the responsibility for provincial standards and credentials.

A number of pilot projects identified through a Request for Proposals are being developed as part of the restructuring of industry training. The pilot projects provide opportunities to test training ideas and to develop and share new approaches and practices. They cover a range of training development across sectors such as heavy industry, oil and gas, automotive and construction, and are intended to demonstrate the feasibility of key elements of the new model.

The pilot projects have been selected to demonstrate specific elements of new models for program development and delivery, and new ways to credential workers to standards that employers recognize. The pilot projects outlined in *Appendix B* illustrate a number of elements of the new model that are slated for early testing. Private trainers, school districts, public post-secondary institutions and equity groups have submitted proposals indicating they are ready and willing to do things in more efficient and effective ways. More pilot projects are anticipated and will serve to demonstrate viability of key elements and allow best practices to be shared.

In order to align training with the needs for specific and transferable skill development, the funding mechanisms for program delivery will change. As envisioned by the TAC, the allocation of training funds will align training delivery with available jobs and ensure that the training can be delivered to current workplace standards. Needs and priorities will be identified annually and some will be addressed through a Request for Proposals process open to both public and private trainers. Consultation will further inform the development of a new funding model.

#### **Competency-based Assessment:**

Competencies are the core of learning and certification in the new model. This concept is not new in British Columbia. Competencies are already defined for trades in B.C., and currently Interprovincial Standard Red Seal credentials are linked to competencies agreed to and validated across Canada. For this reason, interprovincial credentials tie to national and international job classifications systems and are used as an agreed upon starting point for breaking down jobs into tasks and skills at the federal and provincial levels and by many public and private employers.

Current assessment processes, some of which are tied to time on the job only, do not allow for practical assessment of competency at the task and skill level. There is no way for a worker to demonstrate to a set standard what they know and can do other than at the full trade level.

As employers know, no two jobsites are alike, and the scope of work is a big factor in how long it takes to learn, and in what is learned at the worksite. A competency-based system would allow workers to be tested when they are ready. If they are able to demonstrate that they can do work to agreed industry standards, they would receive credentials that recognize their skills.

If the employer does not require all the task and skills competencies for a full trade credential, he or she should be able to identify the tasks and skills required for the job and work with a trainer to develop the training if necessary. This approach would allow many young people into trades who currently do not have opportunities.

As the processes are developed, there is a need to ensure the mechanisms for competency-based assessment are fair and are available to those who want to access them across the province. Further consultation will be undertaken in the development and recognition of task and skill sets for training and credentialing. The TAC envisions this occurring through a variety of mechanisms that involve trainers, industry and workers.

#### **Compulsory Trades:**

Compulsory trades are enabled by the current Industry Training and Apprenticeship Act that allows their designation. In these trades it is mandatory that journeypersons must hold a valid *Certificate of Qualification* to practice their trade and apprentices must be registered through an apprenticeship agreement. No one other than an apprentice or journey person may work in these trades. Across Canada, the compulsory trades vary from province to province so that a compulsory trade in one province may not be compulsory in another. Tradesworkers from other provinces are required to hold a British Columbia Certificate of Qualification in order to be employed within the province in one of these trades.



The compulsory trades are:

- Automotive service technician
- Automotive collision repair technician
- Automotive refinishing technician
- Power line technician
- Electrician
- Sheet metal worker
- Roof, damp and waterproofing technician
- Plumber
- Steamfitter/pipefitter
- Sprinkler system installer
- Refrigeration mechanic

The designation of a trade as compulsory erects a legal barrier that prevents workers from demonstrating or achieving competency outside of an apprenticeship agreement. For this reason, it prevents workers in one trade from accessing training which is designated as part of another compulsory trade.

The development of mechanisms to allow people to demonstrate their skills and knowledge and get credentials is essential to increasing the number of trained workers. The focus should be on the outcome with multiple ways to get there. The overlap of trades and technical careers is increasing, as technical knowledge is needed now more than ever before. A new model must ensure that health and safety considerations are in place to protect the public, but recognize that the mechanisms to ensure this may change.

A key question the TAC is grappling with is the need for mandatory training requirements, and how legislation should ensure public safety. One perspective is that compulsory certification should not be part of training, but part of licensing through other Ministries in the provincial government or with local government licensing and inspectional authorities.

The opposing view is that the removal of compulsory certification designation will ultimately result in the 'deskilling' of trades by removing the legislative requirement for a worker to complete the full scope of training as currently defined, thus limiting worker mobility. Supporters of compulsory trade legislation within an industry training act also believe that the public is protected by mandatory training requirements.

It will require legislative change to permit challenges to obtain credentials in compulsory trades, and to allow for a flexible, modular training system as described in this paper. Since almost half the apprentices are in compulsory trades it would be difficult to implement the model described without applying the principles to training in these trades. This is one of the key elements requiring resolution in order to develop policy and legislative support for a new model of training in British Columbia.

A new Safety Standards Act for British Columbia is being developed that will regulate some of the current compulsory trades. In order to be licenced in British Columbia, workers and contractors will meet specified skills, knowledge and experience requirements.

This legislation could replace the training-related legislation that presently describes those compulsory trades, but legislation will not address all of the compulsory trades<sup>2</sup>. Also, there are other regulated trades where federal requirements are in place – for example, trades dealing with aircraft maintenance. These federal requirements will continue to regulate these trades.

An overview of the proposed legislation, its provisions for work inspection as well as for local flexibility in making determinations of who is qualified are outlined on the Web site

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<sup>2</sup> See Appendix C for a list of trades which will be regulated by the new Safety Standards regulations

of the Ministry of Community, Aboriginal and Women's Services (CAWS), which is developing the legislation<sup>3</sup>.

#### **Accountability:**

A new model must ensure the province can monitor progress toward the goals of improving quality and quantity of training. Measures may be outcome-based (more qualified workers) and process-based (more ways to train; more training available), but will need to be clearly articulated and understood to become the basis for changes to the training system. An accountability framework for publicly funded industry training will be developed to ensure that what is measured is what counts and that the public can see progress toward agreed goals.

As part of the new Accountability Framework, current measures of program delivery will be supported and further developed. Current student outcome data is often inadequate to verify and validate the quality and quantity of training. New measures are needed and could include longitudinal studies of workforce attachment and information on transition from trades to other credentials, and from academic programs to other trade and technical programs.

Performance monitoring will become an integral part of the accountability framework, will include employer and worker validation of the quality of training in a systematic way, and will ensure that the feedback is linked to program review and revision. Accountability measures will apply to all who receive public funds to provide training.

#### **Governance:**

As noted, the TAC has proposed that employers' views should drive industry training in the province through the establishment of a new *Industry Training Authority*. The majority of employers in British Columbia are small enterprises and their training

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<sup>3</sup> See <http://www.marh.gov.bc.ca/SES/>

capacity is limited. They depend on trainers knowing what they want and need, but they have limited ability to influence current programs and standards.

As proposed by the TAC, a nine-member employer board, appointed by government, would be established with a mandate for industry training in the province. The board would be accountable to taxpayers through the accountability framework noted above, but would operate independently of government. The board would hire a chief executive officer and a management team to work with groups of employers and with trainers, public and private. The mandate of the proposed board is to oversee all industry training formerly administered through ITAC, including the development of standards to which learners would be trained in their programs.

Collectively, the board and its staff would form an *Industry Training Authority*. The authority would have legislated authority for policy and program development, and would work with employer groups to develop and deliver programs. For some purposes, employers and employer groups might come together to develop training programs and request provincial standards for these programs based on common needs. The authority will also ensure that training and education programs within their mandate meet learners' needs.

## SUMMARY

Government would like to hear from the public, from employers, from learners and from current apprentices about the new training system model outlined in this paper. The next step is to hear from stakeholders about what is important and what concerns they have in regard to the changes outlined.

## APPENDIX A: NEW MODEL OVERVIEW

### TRAINING DEVELOPMENT

Employers specify competencies. Trainers develop and deliver programs to meet the competency profile requirements. A modularized approach to development and updating of competency expectations is envisioned. The province will continue to participate in development of Red Seal curriculum with cross-Canada partner provinces. Changes to Red Seal trades will inform provincial curriculum development to provincial standards. Other occupations will also need to meet provincial training standards to receive public funding.

### TRAINING DELIVERY

One industry training program that incorporates provincial standards will replace the two separate streams of ELTT and apprenticeship training. ELTT courses will be shorter, but institutions and trainers will also develop new applied programs to deliver more “up front” co-op and classroom-based training. Certificates, diplomas and applied degrees in trade and technical areas will recognize workplace learning, including trades credentials toward other post-secondary programs and credentials. Private-public partnerships for training will allow delivery in more than one place and time to accumulate to a credential. Trainers and institutions will compete for students and offer programs. Employers will have more input into training content and delivery mechanisms.

### CLIENT SERVICES:

- Apprentice Registration: Apprentices will register on line. A new self-registration system will be developed by Spring 2003.
- Technical Training:
  - *Apprentice* enrolls at institution of their choice for technical training after discussion with employer about timing and work priorities. New training models will replace rigid lock step requirements for training scheduling. Continuous intake, where practical, will increase training availability. Training will be available as blocks of time and in more flexible ways.
  - *Challenger* for credentials: Based on competencies, potentially in all trades, the challenge process recognizes prior learning and credentialling through equivalency and assessment. It will include practical and/or written exams to assess what someone knows and can do; learners can challenge for part of a credential or full provincial credential; gaining a provincial credential will allow challenger to write for Red Seal. Services will be available regionally. Those who are not successful at challenge will be linked to training to address skill and knowledge deficiencies and allow them to progress toward a credential.

- Trainees:
  - Various models for up-front training developed (see Training Delivery);
  - Recognition of competency via assessment can give dual credit toward apprenticeship and other certificates, diplomas and applied degrees.
  - New certificates, diplomas and applied degrees will be developed.
  
- Exams and Assessment: Practical and written assessments and Red Seal exams are available regionally; services will be delivered by contract; assessments will be available for parts of trades and groups of competencies. Red Seal exams will continue to be available.
  
- Credentials:
  - Specific skill sets requested by employers can be assessed and credentialed.
  - Credentials can be provided by trainers and institutions.
  - New credentials will be developed to reflect current workplace standards and skill sets and to allow learners to use trade credentials toward other kinds of post-secondary credentials.
  - The Province will approve provincial credentials.
  
- Licensing to do work (in regulated trades): Where applicable, people wanting to work in regulated trades will meet standards through processes established by the federal or provincial regulating agencies.
  
- Employer-Apprentice Agreements: Two-way apprenticeship agreements will be registered with the Province online. Employers validate their apprentices online and can update their records themselves to show current apprentices in training. Apprentices can update their employment information online.

## **ACCOUNTABILITY**

- Learning outcomes surveys will incorporate additional measures of program quality.
- New measures will include employment outcomes for programs and employer satisfaction surveys.
- Current program delivery will be reviewed and adjusted to deliver training as needed to meet current and projected skills shortages.

## **FUNDING:**

- ELTT and apprenticeship technical training funding will be combined.
- Pilot projects will be used as a vehicle to test and implement key elements of new model.
- Funding will be tied to program review and rationalization; programs will be funded within limit of resources available if they result in jobs, meet provincial standards, and satisfy learners and employers.
- Some funding will be allocated annually to emergent needs. Multi-year planning will be continued and expanded.

## **GOVERNANCE:**

- An Industry Training Authority is proposed. This authority will replace the Industry Training and Apprenticeship Commission. It will be comprised of business representatives, a CEO and a small management team. The new board will operate as an agent of government and will have a mandate for the industry training programs formerly administered through ITAC.
- The authority will develop a strategic plan to increase the quality and quantity of industry training in British Columbia targeted to addressing current and projected skills shortages.

## **APPENDIX B: INDUSTRY TRAINING PILOT PROJECTS**

### **Mobile Crane Operators Training**

Operating Engineers local 115 will redesign training for apprentices to allow for specialization within the trade to meet employer needs and shorten the training time.

### **Mechanical Trades**

The Centre for Curriculum, Transfer and Technology and industry and institutional partners will implement a core program across four trades: automotive mechanic, commercial transport mechanic, diesel mechanic and heavy duty mechanic.

### **The Mining Apprenticeship Program**

The Mining Apprenticeship Program is a partnership of Elk Valley Mines and College of the Rockies. It is a flexible apprenticeship structure for heavy duty, welding, millwright, and electrical trades designed to meet the needs of local industry. Ministry funded FTES will be used to deliver the project.

### **Key Skills (Math, Science) Assessment and Development**

The School of Electrical and Electronic Technology at BCIT will develop an online assessment program and develop online training software to meet individual and local industry needs.

### **Apprenticeship Alternative Delivery Model**

Metro College, a private trainer, and the Automotive Retailers' Association will deliver Automotive Apprenticeship technical training for the trades of automotive service technician and autobody collision repair on weekends and evenings in the Vancouver Metro area.

### **Home Builders Specialty Training Program**

The Mission School District and the Canadian Home Builders Association will design and deliver training in residential construction skills to secondary school students, you at and unemployed people at the Riverside Training Centre in Mission. The project will address local skills shortage needs.

### **Building Maintenance Worker Apprenticeship Program**

The Secwepemc Cultural Education Society in partnership with BC Gas will deliver technical training which will address local needs for workers who can maintain and repair housing.



**Technical Training for Drywall, Painting and Roofing**

Kwantlen University College and the Roofing Contractors Association and the Painters and International Brotherhood of Painters and Allied Trades will deliver shorter length core trades training in drywall, roofing and painting.

**Service Rigs Technical Training**

Northern Lights College and Nabors Production Services will develop and deliver training for service rig workers which will address a training gap in the oil and gas sector in the northern region of B.C.

**Millwright Training**

North Island College and industry partners TimberWest and NorskeCanada will deliver training for millwright apprentices. There will be a focus on linking secondary school students with the workplace.

**APPENDIX C: Regulated Trades Under the Proposed Safety Standards Act and Regulations**

**1. Power Engineers and Boiler and Pressure Vessels:**

- ☐ Power Engineers
- ☐ Pressure Welder
- ☐ Refrigeration Mechanic (Indirect)

**2. Electrical:**

- ☐ Electrician
- ☐ Electrical Appliance Service
- ☐ Winder Electrician
- ☐ Elevator Mechanic
- ☐ Locksmith
- ☐ Power Line Technician
- ☐ Refrigeration Mechanic
- ☐ Security Alarms Installer
- ☐ Television and Radio Signal Distribution
- ☐ Full entertainment
- ☐ Low Energy Systems
- ☐ Solar Photovoltaic Systems
- ☐ Underground Raceway Installer
- ☐ Water Pump Installer

Certificates have been discontinued in the following trades but holders of these certificates are regulated:

- ☐ Overhead & Underground Installation
- ☐ Alarm and communication
- ☐ Heating Mechanic
- ☐ Medical/Dental Diagnostic Imaging
- ☐ Fuel Dispensing Equipment in Hazardous Environment
- ☐ Mobile Homes
- ☐ Cathodic Protection
- ☐ Swimming Pools

**3. Gas:**

- ☐ Gas Fitters
- ☐ Gas Appliance Service
- ☐ Gas Piping
- ☐ Recreational Vehicle Installation and Service
- ☐ Liquefied Petroleum Gas Vehicle Conversion
- ☐ Compressed Natural Gas Vehicle Conversion
- ☐ Compressed Natural Gas and Liquefied Petroleum Gas Vehicle conversion
- ☐ Gas Venting

☐ Gas Utility

Note: The following trades are pre-requisites to obtaining trade certification that is regulated by the safety legislation:

- Plumber
- Steamfitter/Pipefitter
- Refrigeration Mechanic
- Sprinkler System Installer
- Appliance Service Technician
- Recreation Vehicle Technician
- Automotive Service Technician
- Sheet Metal Worker

**4. Elevating Devices and Aerial Tramways:**

- ☐ Elevator Mechanics
- ☐ Electricians
- ☐ Welders
- ☐ Carpenters
- ☐ Millwrights
- ☐ Instrument Technicians
- ☐ Heavy Duty Mechanics
- ☐ Machinists
- ☐ Glaziers

Note:

1. Generally, trades certification is not required by Safety Regulation, however the work performed is regulated by Safety Regulation.
2. Welders are qualified in accordance with the adopted welding standards referenced by the applicable Elevating Devices and Passenger Ropeways Regulations.
3. Electricians must be qualified in accordance with the Electrical Safety Regulation for both disciplines

**5. Railways:**

- ☐ Motive Power Fireman
- ☐ Motive Power Operator Steam
- ☐ Motive Power Operator Internal Comb. Electric
- ☐ Motive Power Operator Internal Comb. Hydraulic
- ☐ Motive Power Operator Electric
- ☐ Motive Power Operator < 500 HP IC Electric
- ☐ Motive Power Operator < 500 HP IC Mechanical
- ☐ Motive Power Operator < 500 HP IC Hydraulic
- ☐ Motive Power Operator < 500 HP Electric
- ☐ Motive Power Operator Car Movers
- ☐ Motive Power Operator IC Electric Crane
- ☐ Motive Power Operator IC Mechanical Crane
- ☐ Motive Power Operator Hydraulic Crane
- ☐ Motive Power Operator Steam Crane

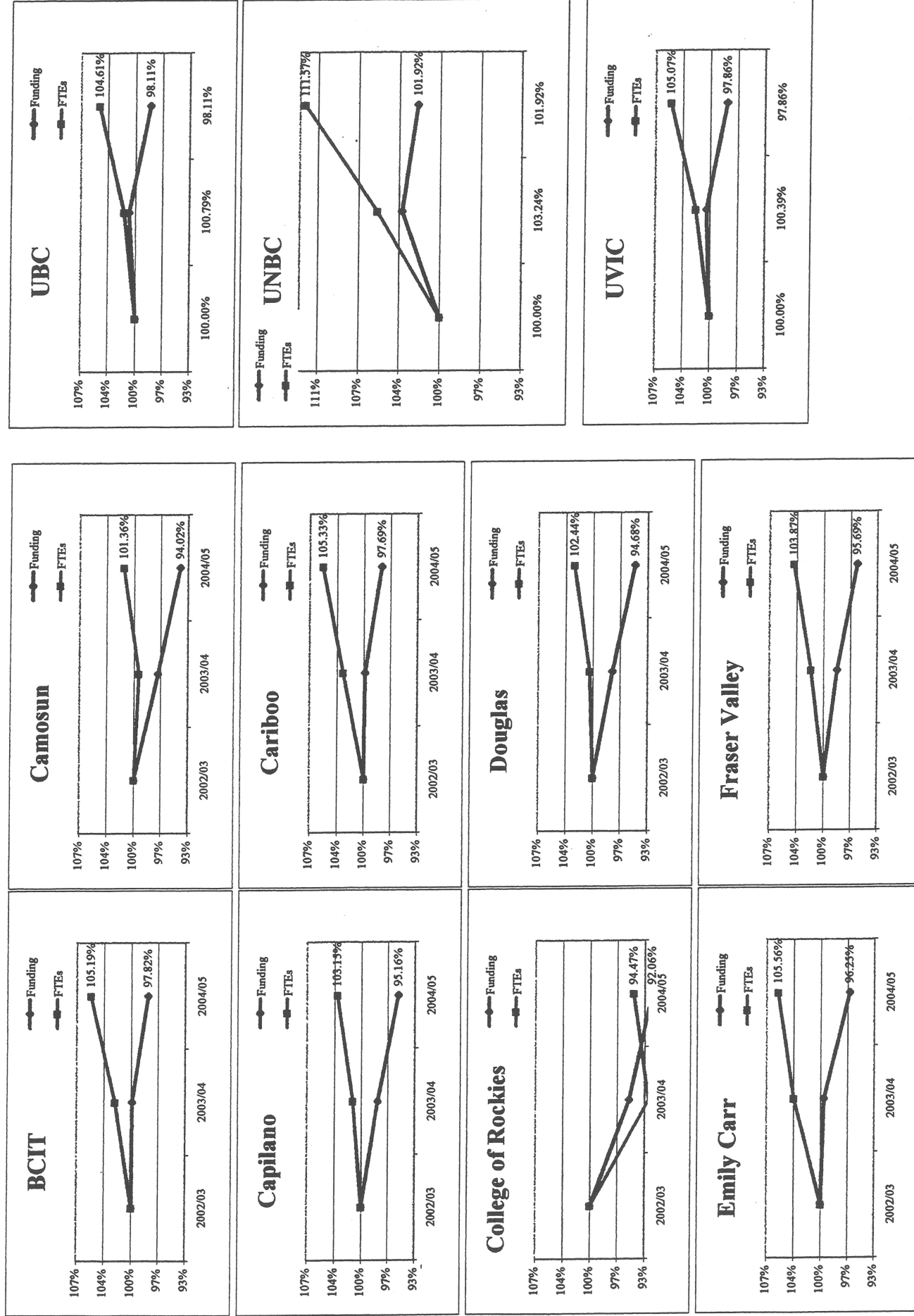
- ☐ Conductor
- ☐ Brakeman
- ☐ Maintenance of Way Foreman
- ☐ Maintenance of Way Machine Operator
- ☐ Sectionman
- ☐ Rail traffic Controller
- ☐ Control Operator
- ☐ Restricted-Remote control Operator



# Tab 5



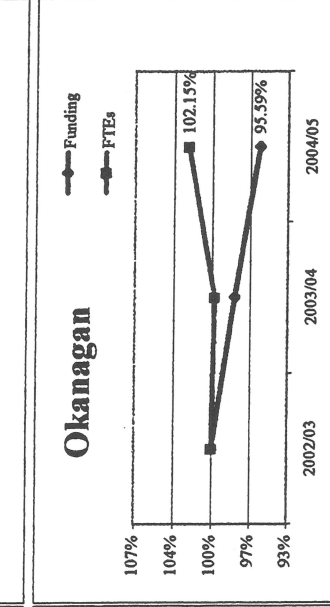
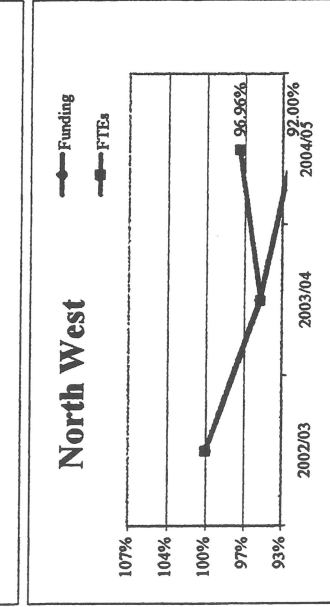
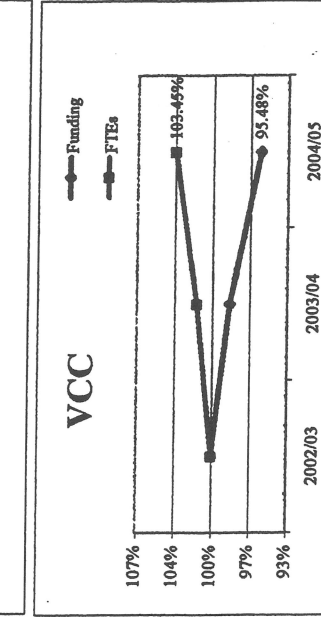
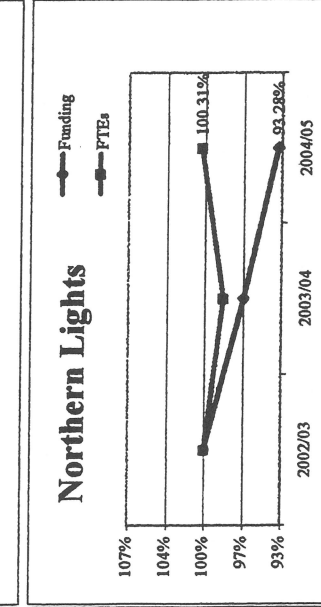
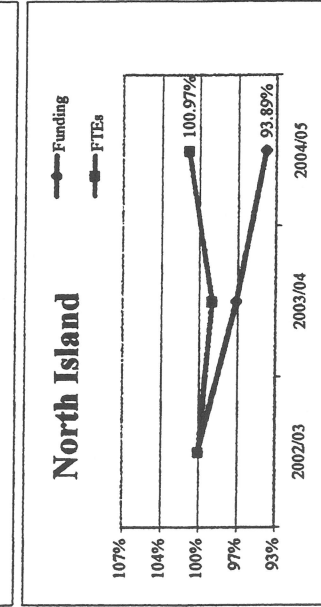
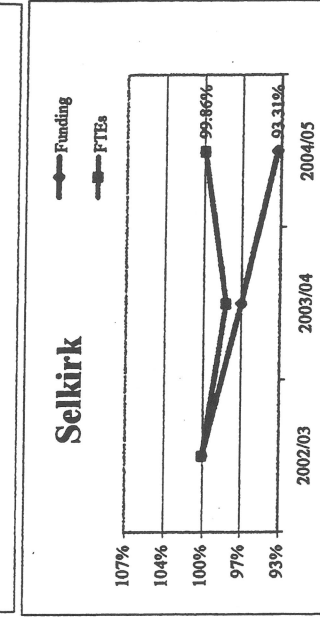
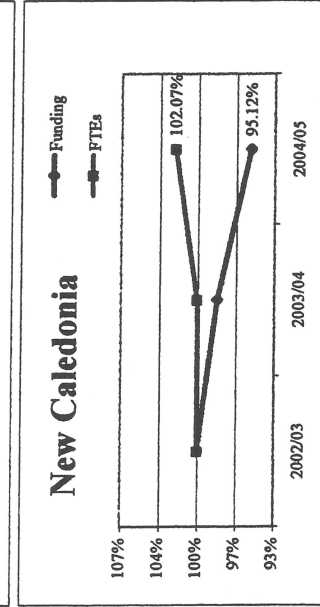
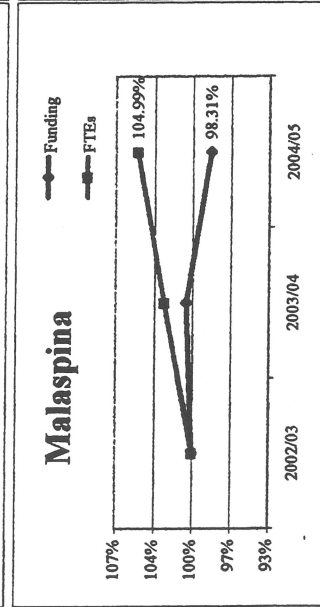
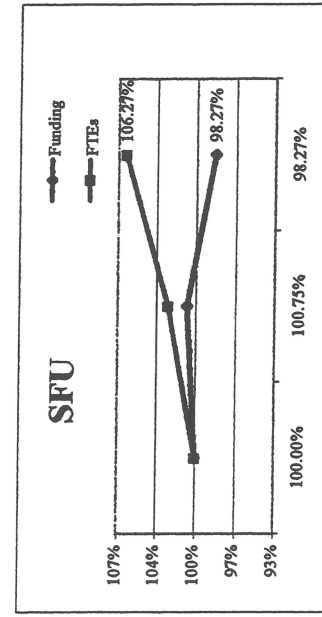
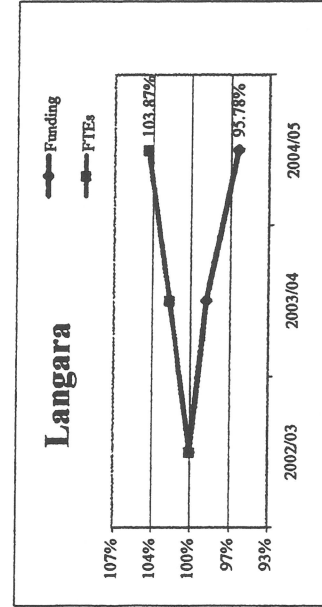
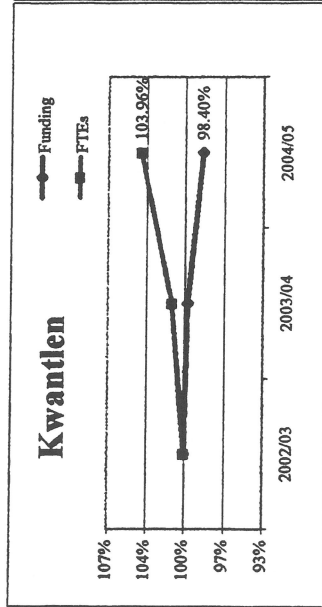
# Increases and Decreases in Funding & FTEs for 2003/04 & 2004/05, relative to 2002/03



( Source of data: <http://www.aved.gov.bc.ca/budget> )

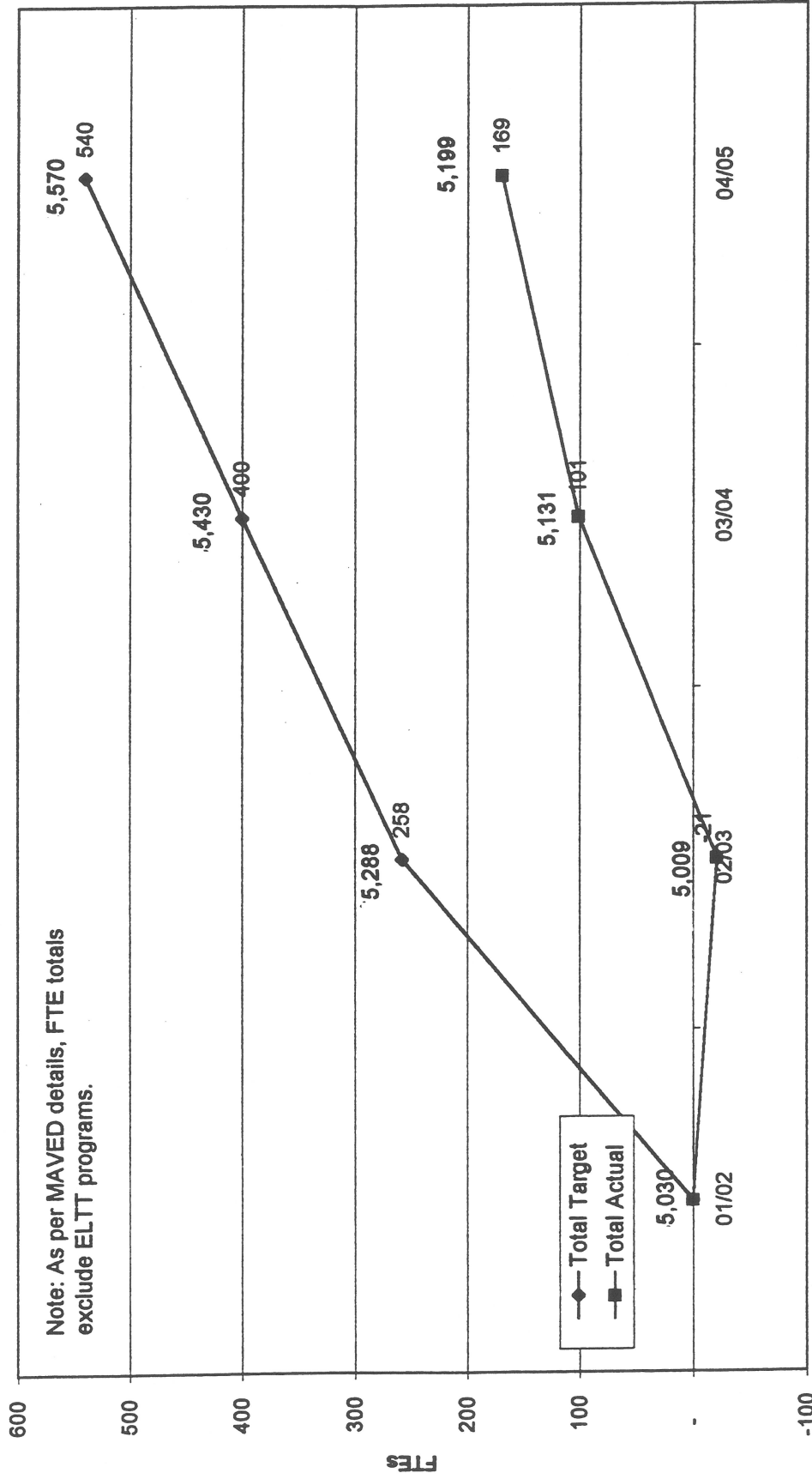








**PROJECTED FTEs  
Block + New Era**

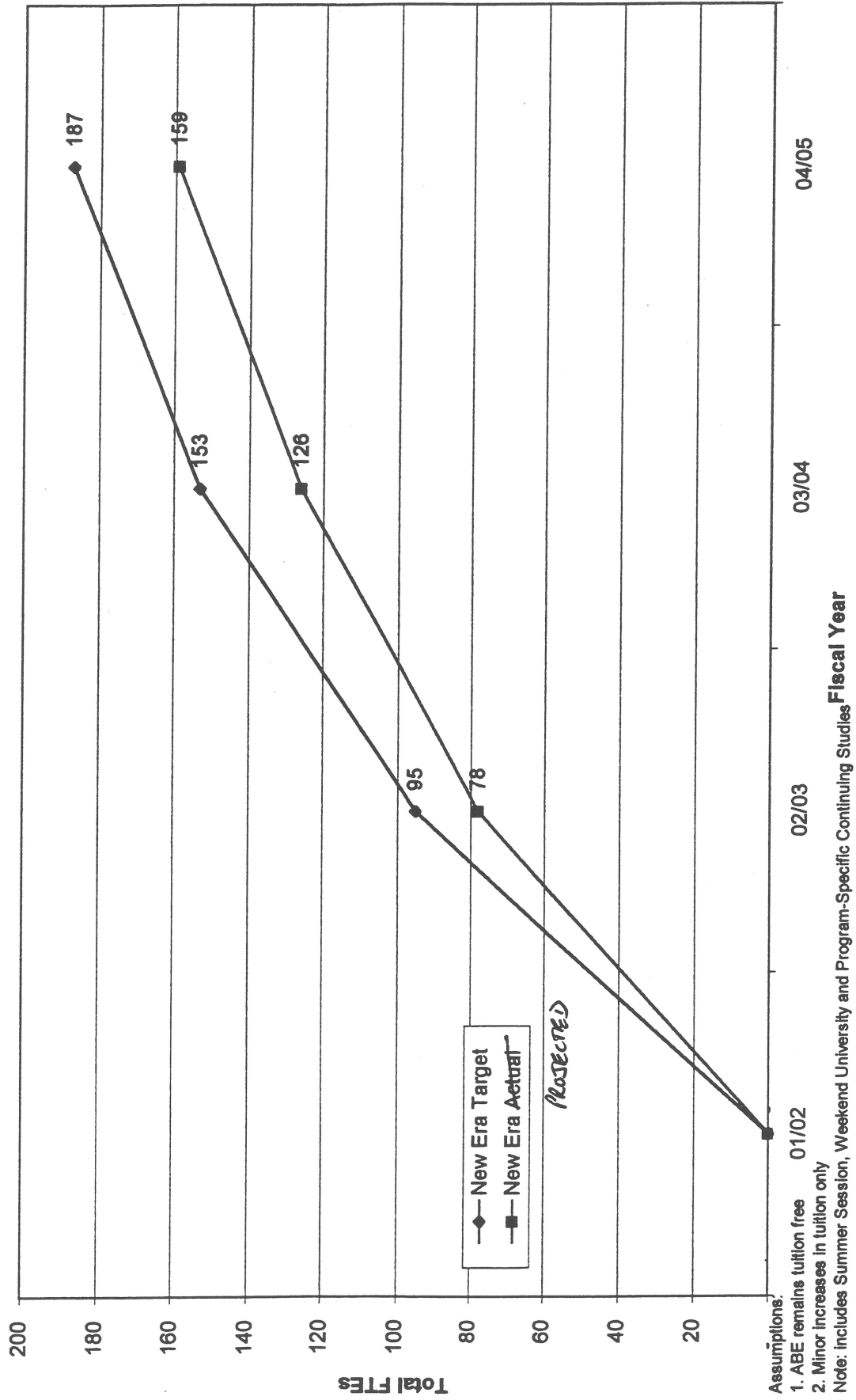


Assumptions:  
 1. ABE remains tuition free  
 2. Minor increases in tuition only  
 Note: Includes Summer Session, Weekend University and Program-Specific Continuing Studies



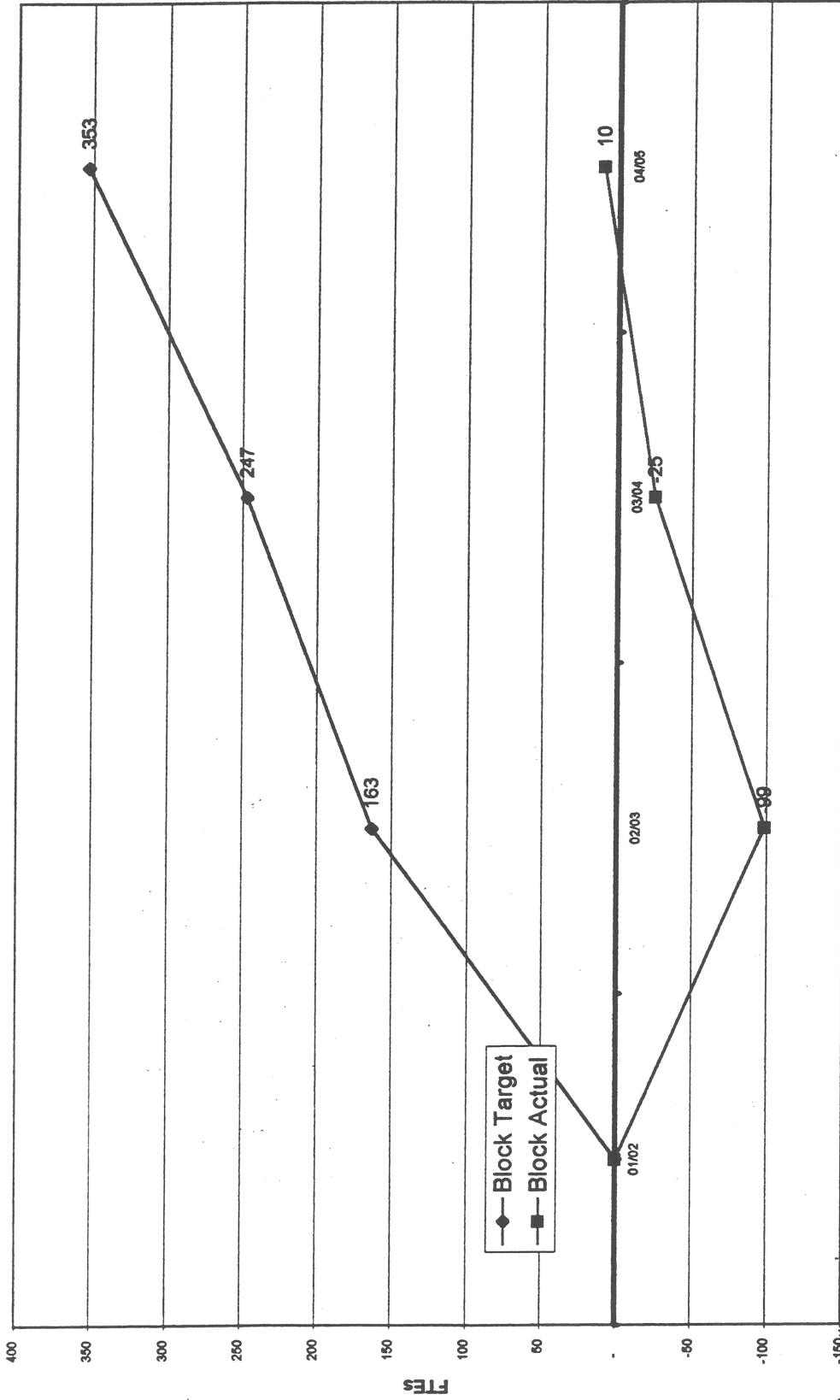
# DRAFT

## New Era FTEs





**PROJECTED BLOCK FTEs**



Assumptions:  
1. ABE remains tuition free  
2. Minor increases in tuition only  
Note: Includes Summer Session, Weekend University and Program-Specific Continuing Studies





# Tab 6



**PRELIMINARY DRAFT**  
for discussion purposes only

Operating Fund

2003/04 Budget Proposals for Consideration

Version #2

Revenue	2002/03		2003/04		2003/04		2003/04		2003/04	
	Budget	Estimated Actuals	* Tuition + 20%	Enrollment % Decline	* Tuition + 25%	Enrollment % Decline	* Tuition + 30%	Enrollment % Decline	* Tuition + 30%	Enrollment % Decline
Government grant:										
Block grant allocation	\$39,875,644	\$39,875,644	\$39,813,414		\$39,813,414		\$39,813,414		\$39,813,414	
Less Block revenue transfers	(1,954,245)	(1,954,245)	(1,954,245)		(1,954,245)		(1,954,245)		(1,954,245)	
Net Block grant allocation	\$37,921,399	\$37,921,399	\$37,859,169		\$37,859,169		\$37,859,169		\$37,859,169	
Entry level trades training	3,932,522	3,932,522	3,932,522		3,932,522		3,932,522		3,932,522	
Apprenticeship	979,119	979,119	979,119		979,119		979,119		979,119	
Tuition:	\$42,833,040	\$42,833,040	\$42,770,810		\$42,770,810		\$42,770,810		\$42,770,810	
Academic *	\$7,084,400	\$7,311,000	\$8,773,000	0%	\$9,139,000	0%	\$9,504,000	0%	\$9,504,000	0%
Career technical *	1,637,000	1,551,000	1,861,000	2%	1,900,000	3%	\$1,956,000	3%	\$1,956,000	3%
Vocational *	1,241,000	1,061,000	1,273,000	2%	1,300,000	3%	\$1,338,000	3%	\$1,338,000	3%
Adult Basic Education:										
- Without Grade 12 certificate	0	0	0		0		0		0	
College Preparation:										
- With Grade 12 certificate	0	0	650,000		650,000		650,000		650,000	
Total tuition	\$9,962,400	\$9,923,000	\$12,557,000		\$12,989,000		\$13,448,000		\$13,448,000	
Continuing studies contribution (includes summer school, weekend university, departmental initiatives, etc.)	\$150,000	\$150,000								
Continuing studies contribution (15% of gross revenue) variable based on enrollment, estimated at \$1.2m			\$180,000		\$180,000		\$180,000		\$180,000	
Other revenue	715,000	715,000	715,000		715,000		715,000		715,000	
Investment revenue	500,000	612,000	550,000		550,000		550,000		550,000	
Departmental revenue	183,000	200,000	200,000		200,000		200,000		200,000	
International contribution	3,801,000	3,801,000	4,040,000		4,040,000		4,040,000		4,040,000	
Total revenue	\$58,144,440	\$58,234,040	\$61,012,810		\$61,444,810		\$61,903,810		\$61,903,810	



**PRELIMINARY DRAFT**  
for discussion purposes only

University College of the Cariboo  
Operating Fund  
2003/04 Budget Proposals for Consideration  
Version #2

	2002/03 Budget	2003/04 * Tuition + 20%	2003/04 * Tuition + 25%	2003/04 * Tuition + 30%
<b>Expenditures:</b>				
Expenditure budget 2002/03 *	\$58,144,440	\$58,144,000	\$58,144,000	\$58,144,000
Adjustments:				
Salary and benefits		1,843,523	1,843,523	1,843,523
Workload related		450,000	450,000	450,000
Annualizations		466,000	466,000	466,000
New Era related		347,477	347,477	347,477
Non-salary related (net)		300,000	300,000	300,000
Total Expenditures	<u>\$58,144,440</u>	<u>\$61,551,000</u>	<u>\$61,551,000</u>	<u>\$61,551,000</u>
Difference	<u>\$0</u>	<u>(\$538,190)</u>	<u>(\$106,190)</u>	<u>\$352,810</u>

- \* This expenditure plan will:
- Continue the funding for student bursaries (\$250,000)
  - Continue the funding for work study (\$150,000)
  - Maintain the balance in the emergency student loan fund (\$100,000)
  - Continue the funding for library degree programs (\$625,000)
  - Continue the funding for equipment related (\$850,000)



# University Tuition Fees for Full-Time Canadian Arts Students at AUCC Member Institutions

Source: Association of Universities and Colleges of Canada

	Academic Tuition Fees <u>2002/03</u>	Incidental / Ancillary <u>Fees</u>
<b><u>Newfoundland</u></b>		
Memorial University of Newfoundland	\$2,670	\$328 - \$404
<b><u>Prince Edward Island</u></b>		
University of Prince Edward Island	\$3,870	\$448
<b><u>Nova Scotia</u></b>		
Acadia University	\$6,584	\$322
Dalhousie University	\$4,860 - \$5,670	\$598
Mount Saint Vincent University	\$4,575	\$423
Nova Scotia College of Art and Design	\$4,560	\$336
Saint Mary's University	\$4,685	\$134 - \$289
St. Francis Xavier University	\$4,940	\$514
Université Sainte-Anne	\$4,738	\$210
University College of Cape Breton	\$4,570	\$359
University of King's College	\$4,865 - \$6,175	\$436 - \$562
<b><u>New Brunswick</u></b>		
Mount Allison University	\$4,980	\$184
St. Thomas University	\$3,520	\$114
Université de Moncton	\$3,820	\$375
University of New Brunswick	\$4,265	\$278
<b><u>Quebec (residents of the province of Quebec only)</u></b>		
Bishop's University	\$1,668	\$787
Concordia University	\$1,668	\$902 - \$1,053
Université Laval	\$1,668	\$327 - \$382
McGill University	\$1,668	\$1,015 - \$1,450
Université de Montréal	\$1,668	\$390 - \$440
Université de Québec	\$1,668	\$40
Université de Sherbrooke	\$1,668	\$229 - \$291
<b><u>Ontario</u></b>		
Brock University	\$4,106	\$258 - \$439
Carleton University	\$4,070 - \$4,732	\$530
University of Guelph	\$4,106	\$706
Lakehead University	\$4,060	\$423
Laurentian University	\$4,106	\$331
University of Sudbury	\$4,106	\$331
McMaster University	\$4,032	\$594 - \$837
Nipissing University	\$3,870	\$711
University of Ottawa	\$4,085	\$293 - \$587
Saint-Paul University	\$3,116	\$24





# University Tuition Fees for Full-Time Canadian Arts Students at AUCC Member Institutions

Source: Association of Universities and Colleges of Canada

	Academic Tuition Fees <u>2002/03</u>	Incidental / Ancillary <u>Fees</u>
Queen's University at Kingston	\$4,111	\$704 - \$791
Ryerson Polytechnic University	\$4,178	\$485
University of Toronto	\$4,107	\$202 - \$1,428
University of St. Michael's College	\$4,107	\$1,057
University of Trinity College	\$4,107	\$1,062
Victoria University	\$4,107	\$843
Trent University	\$4,106	\$547
University of Waterloo	\$4,030 - \$4,058	\$412 - \$866
St Jerome's University	\$4,030 - \$4,058	\$463
University of Western Ontario	\$4,065	\$806
Brescia College	\$4,065	\$862
Huron University College	\$4,065	\$983
King's College	\$4,115	\$917
Wilfred Laurier University	\$4,106	\$400 - \$589
University of Windsor	\$4,008	\$582 - \$632
York University	\$4,106	\$556 - \$975
<b><u>Manitoba</u></b>		
Brandon University	\$2,730	\$387
University of Manitoba	\$2,818	\$327 - \$1,108
Collège universitaire de Saint-Boniface	\$3,200	\$800
University of Winnipeg	\$2,786	\$337 - \$552
<b><u>Saskatchewan</u></b>		
University of Regina	\$3,585	\$598 - \$840
Campion College	\$3,585	\$598 - \$840
Luther College	\$3,585	\$598 - \$840
Saskatchewan Indian Federated College	\$3,585	\$598 - \$840
University of Saskatchewan	\$4,128	\$315 - \$465
St-Thomas More College	\$4,128	\$315 - \$465
<b><u>Alberta</u></b>		
University of Alberta	\$4,032	\$451
Augustana University College	\$5,330	\$133
University of Calgary	\$4,120	\$540
Concordia University College of Alberta	\$5,072	\$277
The King's University College	\$5,983	\$240
University of Lethbridge	\$3,470	\$825



# University Tuition Fees for Full-Time Canadian Arts Students at AUCC Member Institutions

Source: Association of Universities and Colleges of Canada

	Academic Tuition Fees <u>2002/03</u>	Incidental / Ancillary <u>Fees</u>
<b><u>British Columbia</u></b>		
University of British Columbia *	\$2,661	\$422 - \$466
University of Northern British Columbia	\$2,755	\$796
Simon Fraser University	\$2,853	\$238
University of Victoria **	\$2,796	\$396
University College of the Cariboo	\$2,400	\$483
University College of the Fraser Valley (years 1 & 2)	\$2,200	?
University College of the Fraser Valley (years 3 & 4)	\$2,500	?
Malaspina University College	\$2,370	?
Okanagan University College	\$2,340	\$285
Royal Roads (B Comm)	\$3,700	?

\* For 2003/04 University of British Columbia announced a 30% increase in undergraduate tuition fees, therefore the 2003/04 tuition will be \$3,459.

\*\* For 2003/04 University of Victoria approved a 30% increase in undergraduate tuition fees, therefore the 2003/04 tuition will be \$3,635.

Average tuition for Canada (excluding Quebec and BC)	\$4,143
Average tuition for Canada (excluding BC)	\$3,872
Average tuition for Canada	\$3,726
Average tuition for BC	\$2,692



# Tab 7



**COMPARISON OF FEES**  
**( Standard 5 courses , no lab/ supplies fees\*)**

**FALL/2002 SEMESTER**

<b>Required Fees</b>	<b>OUC</b> (per 15 cr)	<b>SFU</b> (per 15 cr)	<b>UBC</b> (per 15 cr)	<b>U of VIC</b> (per 7.5 units)	<b>UCC</b> (per 15 cr)
Undergraduate Tuition Fees	<b>\$1,170.00</b> (78.00/cr)	<b>\$1,426.50</b> (95.10/cr)	<b>\$1,330.50</b> (88.70/cr)	<b>\$1,398.00</b> (93.20/cr)	<b>\$1,200.00</b> (80.00/cr)
Student Society Fees (Alma Mater fees at UBC)	<b>\$81.90</b> (7% of Tuition)	<b>\$24.85</b>	<b>\$27.90</b> (1.86/cr)		<b>\$57.60</b> (6.40/cr cap 9 cr)
Athletics & Intramurals			<b>\$21.00</b> (per Year)		
Athletics & Recreation		<b>\$39.00</b>	<b>\$129.15</b> (8.61/cr/yr)	<b>\$48.00</b>	
Undergraduate Society Fees (charged per program ie Arts)			<b>\$13.00</b> (per year)		
Ancillary Fees					<b>\$109.20</b> (7.28/cr)
Comprehensive University Fee					<b>\$75.00</b> (5.00/cr)
Student Activity Fees	<b>\$60.84</b> (5.2% of tuition)	<b>\$31.66</b>		<b>\$48.46</b>	
Student Services Fee		<b>\$23.40</b>			
U-Pass (Bus Pass – Mandatory)				<b>\$50.00</b>	
Building Fund				<b>\$13.00</b>	
<b>Total Required Fees</b>	<b>\$1,312.74</b>	<b>\$1,545.41</b>	<b>\$1,521.55</b>	<b>\$1,557.46</b>	<b>\$1,441.80</b>

<b>Optional Fees</b>					
Extended Health & Dental	<b>\$224.92</b>		<b>\$180.00</b>	<b>\$225.00</b>	<b>\$214.00</b>
Student Aid Bursary Plan Fund/ Student Legal Fund/Publishing Fee			<b>\$18.00</b>		
<b>Total Fees</b>	<b>\$1,537.66</b>	<b>\$1,545.41</b>	<b>\$1,719.55</b>	<b>\$1,782.46</b>	<b>\$1,655.80</b>

**\*Note:** Only lab & supplies fees are charged for Fine Arts courses at SFU (range \$20-\$100 per course and U of Vic (+\$18.64 per course) none for UBC, OUC (+23.40 per course). At UCC we currently charge an extra \$16.50 for each course which has a lab or studio component.





# Tab 8



## **BPPC Motions 2003-04**

### **Background**

- UCC is entering the second year of the rolling three year "Block" Funding Plan,
- UCC has now received the draft report entitled "An Accountability Framework for the Post Secondary Education System".

### **Motions (2002-03):**

#### **Tuition Fees**

**BPPC recommends that UCC review and revise undergraduate fees so that they are comparable over time to tuition fees at the provincial or national average for undergraduate institutions, and that UCC review and revise career/technical and vocational/trades fees to make these fees comparable to the annual academic fees.**

**Approved 21 January 2003**

#### **Non-Salary Adjustments**

**That given the low inflation rate and the modest adjustment made in fiscal 2001-02, the BPPC recommends that no increases in non-salary items be considered for 2003-04 and 2004-05, except where there are contractual obligations to increased costs or fees.**

**Approved 21 January 2003**

### **New Motions (2003-04)**

#### **Resource Allocation Strategies – FTE Accountability**

##### **Background:**

- UCC is now funded by a "Block" government grant which will decrease by \$921,837 (excluding ELTT) over the next two fiscal years,
- All government funding envelopes for Part Time Vocational (programming support for non credit and regional activity), Skills for Employment, Institutional Based Training, Work Study, Labour Adjustment, Training Assistance Benefits and New Learning Opportunities (regional support) has been discontinued,
- UCC is expected to increase its credit programming by 540 FTE between 2002-03 and 2004-05,
- Government is introducing new accountability framework that will quantify UCC's performance. Credit FTE production will be the primary performance measure,
- UCC is expected to increase its space utilization for credit programming to include weekend and tri-semester programs before new capital funding is available for new facilities,
- UCC will have to absorb all costs of negotiated collective agreements, increased benefit costs, workload changes, non-salary inflation, etc., between 2002-03 and 2004-05.



**Recommendation:**

**That UCC continues to examine its “Block” expenditures to ensure that resource allocation strategies are aligned with the Ministry of Advanced Education’ priorities and UCC’s goal to deliver the additional credit FTE to meet the FTE targets within the three year “Block” funding envelope.**

**Approved 21 January 2003**

**Equipment Related Purchases**

**Background:**

- Operating Capital is now included as part of the “Block” grant,
- Prior to 2002-03 Operating Capital Equipment (\$850,000) was funded separately by the Ministry,

**Recommendation:**

**That UCC continues to identify separately \$850,000 for Equipment Related Purchases.**

**Approved 21 January 2003**



# Tab 9







March 11, 2002

Our Ref. 38706

Dr. Roger Barnsley, President  
University College of the Cariboo  
900 McGill Rd  
PO Box 3010  
Kamloops BC V2C 5N3

Dear Dr. Barnsley:

I am writing to provide you with information regarding government's priorities for the coming year and specific information regarding the operating budget allocation and service delivery targets for the University College of the Cariboo (UCC).

Accountability Framework

As you are aware, accountability to taxpayers for services delivered is a key priority for this government. Over the past several months, major initiatives were undertaken to position ministries to better account for the use of public funds. Chief among these were the amendments to the *Budget Transparency and Accountability Act* (BTAA) and the Core Services Review.

According to the amended BTAA, the Ministry is required to table a three-year Service Plan on Budget Day (the third Tuesday in February of each year). The Ministry's Service Plan for 2002/03 – 2004/05 has been prepared in accordance with the BTAA, and a copy can be accessed at <http://www.gov.bc.ca/aved/> on the Ministry's website. For your information, Appendix 1 (attached) contains a description of all the measures contained in the Ministry of Advanced Education Service Plan, as well as other measures related to post-secondary education contained in the 2002 Government Strategic Plan.

You will note that there is a new performance measure in the plan regarding the establishment of an accountability framework. As a result of the Core Services Review, the Ministry has been reorganized and refocused on essential core services, an integral part of which is the shift to results-based management and greater accountability for the public funds invested in the public post-secondary system.

.../2

Since the management of the public post-secondary education system is a collaborative effort between the Ministry and system partners, institutional participation in the process of developing this framework is essential. It is anticipated that the accountability framework will build on the good work your institution has already accomplished in this area. While I recognize that the year ahead will be a transitional year, it is important to move quickly in this process.

Many of the expectations described in this letter will become features of the new accountability expectations in the short term. Not surprisingly, I anticipate that the objectives and performance measures that flow from our accountability discussions to be much more results intensive and less input oriented. This approach is foreshadowed in the move this year towards block funding, which should provide more operating flexibility. To be clear though, programs such as Adult Basic Education, Literacy, English Language Training and Adult Special Education are important avenues for disadvantaged students to access post-secondary education. Institutions' ability to meet the needs of these students will be a component of the accountability framework to be developed over the next year.

The amended BTAA also requires the Ministry to report annually (by August 31 each year), outlining how actual results compared with the expected results identified in the Service Plan. The annual Service Plan Report will require the Ministry to collect information from your institution. To assist with this, the Ministry plans to complete the implementation of the Central Data Warehouse (CDW) by June 30, 2002, at which time all colleges, university colleges and institutes will be expected to submit timely, good quality student level data to the CDW, on June 30 and November 30 each year.

### **Tuition Fee Policy**

Further to the announcement on February 11, 2002, regarding the deregulation of tuition fees, the *Access to Education Act*, which reduced tuition and froze ancillary fees at British Columbia public post-secondary institutions, is expected to be repealed, effective March 31, 2002. Adult Basic Education courses and programs will continue to be offered tuition-free.

### **Block Grants and Student FTE Targets**

In order to facilitate multi-year planning by post-secondary institutions, the Ministry is providing institutions with their block grants and service delivery targets for each of the next three fiscal years, 2002/03 to 2004/05. The move toward block funding for colleges, university colleges and institutes, initiated this year, will give institutions the flexibility to achieve their targeted level of educational program delivery.

In 2002/03, the Ministry's total block grants for the college, university college and institute sector has increased \$18.26 million from the previous year. Of that allocation, UCC will receive a block grant of \$39,875,644 in 2002/03.

With this funding, it is expected that UCC will provide for the annualization of student FTEs funded in previous budget years, and maintain or increase student FTEs in specific educational programs to meet the government's New Era commitments, described in more detail below.

UCC is expected to deliver 5,288 student FTEs in 2002/03. If the situation arises whereby an institution is unable to meet its FTE target, a review will be undertaken and FTEs and related funding may be reallocated within the system the following year.

UCC's block grant for 2003/04 will be \$39,813,414 with a student FTE target of 5,430; and in 2004/05, it will be \$38,953,807 with a student FTE target of 5,570. This information is provided for planning purposes. As in the past, funding is voted by the legislature on an annual basis and may be subject to change.

#### New Era Commitments

Government is committed to addressing skills shortages in Health, Social Work and targeted High Technology areas, and to strengthen on-line learning around the province. The following provides more information on these New Era commitments. Schedule A also includes a summary table which provides the number of 2001/02 base FTEs and any incremental growth in FTEs to be delivered over the next three years, 2002/03 to 2004/05. FTEs are to be delivered in the specific programs listed in the table. Funding for the New Era commitments is included in UCC's block grant. Accordingly, it is expected that UCC will meet the student FTE targets for those programs that have been determined to be eligible to meet the New Era commitments.

#### Double the Annual Number of Graduates in Computer Science and Electrical and Computer Engineering within Five Years

The 2002/03 block grants for the college, university college and institute sector include provision for 75 additional student FTEs towards government's commitment to double the annual number of graduates in Computer Science and Electrical and Computer Engineering within five years. Another 85 student FTEs will be allocated in 2003/04, and a further 75 FTEs in 2004/05.

### Expand Training for Care Aids, Licensed Practical Nurses and Registered Nurses

The 2002/03 block grants for the college, university college and institute sector include provision for an additional 879 student FTEs towards government's commitment to expand training and post-secondary programs to graduate more Nurses, Care Aids and Allied Health professionals.

Nursing, Care Aid and Allied Health program allocations for 2003/04 and 2004/05 will be finalized during fiscal 2002/03. The allocations for these programs include funding for the annualization of programs, but not for additional new FTEs. Expansion in other Health programs may be implemented in future years following further discussions with institutions.

### Train More Social Workers

The block grants for the college, university college and institute sector include provision for an additional ten student FTEs in 2002/03 towards government's commitment to train more Social Workers.

Of the four student FTEs in Social Work programs that are allocated to UCC, two student FTEs will be delivered by Nicola Valley Institute of Technology.

### Strengthen On-line Learning

The 2002/03 block grants for the college, university college and institute sector include an additional 130 student FTEs towards government's commitment to strengthen on-line learning throughout the province. It is anticipated that an incremental increase of 130 student FTEs will be available in 2003/04, and a further incremental increase of 130 student FTEs will be available in 2004/05. Decisions on the allocation of these increases in 2003/04 and 2004/05 will be made at a later date.

Your institution's participation in this important initiative is appreciated. Please note that on-line learning FTEs must be delivered in programs meeting the criteria provided by Arlene Paton, Director, Public Institutions Branch, in her message to you on January 28, 2002.

### Additional Funding Information

#### Medical Services Plan Premiums

Funding to assist with the increase in Medical Services Plan premiums has been allocated to institutions based on the number of staff FTEs, and is included in your block grant.

### Co-operative Education, Prior Learning Assessment and Aboriginal Coordinators

Funding allocations under the Co-operative Education Fund of British Columbia, and allocations for Prior Learning Assessment and Aboriginal Coordinators, have been included in your block grant. As you are aware, the final year of the additional funding for support of co-operative education under the High Technology Strategy was 2001/02.

### Disability Services Grant

Funding for disability services previously provided under the Disability Services Grant and the Interpreting Services Grant has been included in your block grant. To meet the federal government's reporting requirements for services to persons with disabilities, the Ministry will be requesting, at a later date, an annual report on actual expenditures for these services.

### Library Support for Degree Programs

For 2002/03, the Ministry is providing \$2.5 million to support library resources at the university colleges. This funding recognizes the importance of maintaining and improving library acquisitions to enhance the quality of degree programs offered at these institutions. As in previous years, the library support grants are allocated primarily on the basis of the number of funded upper level FTEs at each university college, with adjustments made to recognize the unique circumstances of Kwantlen University College and the University College of the Fraser Valley.

Included in your 2002/03 block grant is \$624,993 for library support. In future years, other adjustments may be made to the grants to recognize changes to budget allocations and differing circumstances at the institutions.

### Funding Reallocations

I would like to address the programs that, on January 17, 2002, were described as either terminated or under review.

Funding for Part-Time Vocational programming (identified on January 17 as under review) is included in your 2002/03 block grant, and the FTEs delivered with this funding will be counted toward your 2002/03 FTE target. However, beginning in 2003/04, institutions are no longer required to deliver Part-Time Vocational programming, and Ministry funding will be reallocated. You may wish to continue to deliver this type of programming on a full cost recovery basis to

meet community needs. However, such activity is not to be counted toward your institution's FTE target, beginning in 2003/04. UCC's student FTE targets for 2003/04 and 2004/05 have been reduced to reflect this change.

The Ministry is no longer requiring institutions to provide additional support to Institutional Based Training (IBT) students over and above regular student support services. As a result, IBT support funding has been reallocated.

Your institution's 2002/03 block grant does not include any contribution by the province toward the Labour Adjustment Envelope. I would also like to advise you that funding for the Skills for Employment Program (SEP), and the College and Institute Matching Endowment Fund has been reallocated.

The funding for the New Learning Opportunities Envelope has also been reallocated in 2002/03, and you are no longer expected to deliver any FTEs under this initiative. Your institution's student FTE targets for 2002/03 and subsequent years have been reduced to reflect this change.

#### Project Funding

The Aboriginal Special Projects fund will be available again in 2002/03 and is not included in your block grant. Details regarding this fund will be provided at a later date.

You can assume that funding for any programs or services that UCC received in previous years, either on a project basis or as part of your non-formula grant, that has not been identified above, has been included in your block grant.

#### Funding for Entry Level Trades Training

For 2002/03, funding for Entry Level Trades Training (ELTT) is maintained at last year's levels. Institutions may reallocate across ELTT programs but should meet or exceed ELTT FTE targets. ELTT program funding in the amount of \$3,932,522 will be provided to UCC with a student FTE target of 509 for 2002/03. This funding is separate from your block grant.

A new model for trades training will be developed over the next year in consultation with institutions and industry. I anticipate that there will be implications for ELTT training delivery. Changes will be communicated as this information is available. The intention is to align ELTT more closely to labour market needs and move to a more integrated model for trades training with better articulation to credentials.

## Capital Funding

### Annual Capital Allowance

For 2002/03, in addition to the block grant, the Ministry is providing institutions with an Annual Capital Allowance (ACA) funding allocation. The Ministry's total ACA budget for universities, colleges, university colleges and institutes is \$64.8 million in 2002/03. This ACA funding allocation is to be used to fund minor capital maintenance renovation and upgrade projects, one-time project pre-planning and site master planning.

This new ACA formula allocation replaces the project specific capital project request system used in 2001/02. While this new approach maximizes institutional autonomy, it is important that institutions and the Ministry be able to demonstrate appropriate accountability regarding these funds. Institutions are therefore required to develop and maintain multi-year plans that address maintenance and renovation/upgrade requirements, and provide the Ministry with an annual report concerning their ACA expenditures. Further clarification regarding the format and timing of these reports will be provided in the near future.

The formula used to allocate the ACA budget among institutions is based upon the current ACA formula (i.e. size of space inventory, with an age of facilities multiplier), plus a new location multiplier taken from the capital project budget model that was introduced in 2001. This new location multiplier ensures value per dollar equity regardless of an institution's geographic location.

The ACA funding allocation is intended to supplement, not replace, current expenditures for janitorial, utilities, buildings and grounds maintenance, etc. (Function 10). Expenditure patterns in this area will continue to be monitored by the Ministry, and further clarification regarding how these expenditures will be monitored will be provided in the near future.

Please be aware that regardless of the nature of the funding and the accounting treatment, government public tender policies require that capital projects must be competitively tendered through a fair, open and transparent process, and awarded to the lowest cost, qualified, legal bidder.

Within the parameters outlined above, ACA spending is generally at the discretion of the institutions. However, projects that have an impact on facility capacity should be discussed with Ministry staff prior to commitment of funds. ACA funds should not be used for expansion projects that add to an institution's space inventory, or for replacement projects. Projects of this



nature should be part of an institution's five-year capital budget submission to the Ministry. Five-year capital budget submissions for the period 2003/04 – 2007/08 are due to the Ministry's Facilities Branch on or before August 15, 2002.

The 2002/03 ACA funding allocation for UCC is \$1,909,980.

Year-Round Utilization of Campus Facilities

As you know, Treasury Board has directed the Ministry to increase the year-round utilization of post-secondary institution campus facilities for base-funded educational activity. Treasury Board has indicated that its support for future capital funding requests will be conditional upon evidence of increased year-round facility utilization. Ministry staff will be contacting institutions in the near future concerning baseline information and reporting requirements.

The above budget information, summarized in Schedule A (attached), should provide the basis for your planning and activities for the coming year. Your commitment to the development of an excellent advanced education system in British Columbia is appreciated.

Sincerely,



Gerry Armstrong  
Deputy Minister

Attachments

pc: Chair, Board of Governors

Cliff Neufeld, Vice-President  
Administration and Finance

# Schedule A

## UNIVERSITY COLLEGE OF THE CARIBOO

### 2002/03 Operating Budget Allocation and Service Delivery Targets

Cariboo	2002/03	
	FTEs	\$
AVED Block Grant *	5,288	\$39,875,644
ELTT Funding	509	\$3,932,522
Annual Capital Allowance	---	\$1,909,980
<b>Total</b>	<b>5,797</b>	<b>\$45,718,146</b>

\* FTE target for the Block Grant includes the FTEs to meet the New Era commitments listed below.

Cariboo	Allocated FTEs for New Era Commitments			
	Base FTEs 2001/02	Incremental FTEs		
		2002/03	2003/04	2004/05
<b>Double the Computer Graduates</b>				
Bachelor of Science in Computing Science\				
Bachelor of Technology in Applied Computing S	50	13	13	13
<b>Health</b>				
Diploma in Nursing\Registered Nurse-Kamloops	160	28	8	0
Diploma in Nursing\Registered Nurse-Williams L	20	0	0	0
Bachelor of Science in Nursing	70	18	18	16
Resident Care Attendant	37	16	0	0
Anaesthesia Technology\Cardiovascular Perf.	6	0	0	0
Respiratory Therapy	115	15	15	5
<b>Train More Social Workers</b>				
Bachelor of Social Work	90	2	2	0
Bachelor of Social Work - NVIT	23	2	2	0
<b>On-line Learning</b>				
Applied Business Technology On-line	6	(2)	0	0
Associate of Arts On-line	0	3	0	0
Bachelor of Tourism On-line	5	0	0	0
<b>Total</b>	<b>582</b>	<b>95</b>	<b>58</b>	<b>34</b>

## APPENDIX 1

### MINISTRY OF ADVANCED EDUCATION GOALS, PRIORITIES MEASURES AND TARGETS FROM THE 2002/05 SERVICE PLAN

#### Goal 1 — A Top-Notch Post-Secondary Education System

##### Promote a More Efficient and Integrated Post-Secondary Education System

Priority	Performance Measure	Target		
		02/03	03/04	04/05
Improve Graduation Rates The Ministry works with post-secondary institutions to improve success.	<ul style="list-style-type: none"> <li>Number of degrees, diplomas and certificates awarded in the public system</li> </ul>	Establish baseline	Increase in the number of degrees and diplomas granted in B.C.	Increase number of degrees and diplomas granted in B.C.
Encourage System Integration The Ministry works with the post-secondary system to develop a more coherent and integrated system.	<ul style="list-style-type: none"> <li>Mandate, roles and responsibilities of the system reviewed</li> </ul>	Consultation completed	New legislation	(Completed)
	<ul style="list-style-type: none"> <li>Number of credit transfer arrangements</li> </ul>	Increase in the number of arrangements	Increase in the number of arrangements	Increase in the number of arrangements

##### Enhance Student Choice

Priority	Performance Measure	Target		
		02/03	03/04	04/05
Expand Degree-Granting Options for Students The Ministry works to expand the number of degree-granting institutions through development of a quality assurance board.	<ul style="list-style-type: none"> <li>Enactment of enabling legislation</li> </ul>	Legislation for expanded degree granting opportunities	(Completed)	(Completed)
Expand On-line Access The Ministry works to develop e-Merge/B.C. campus on-line initiatives.	<ul style="list-style-type: none"> <li>Number of new FTEs enrolled in on-line learning</li> </ul>	130	130	130

## Improve Quality of Education

Priority	Performance Measure	Target		
		02/03	03/04	04/05
<b>Quality Enhancement</b> The Ministry recognizes that quality is in part reflected by the value students place on the education they receive.	<ul style="list-style-type: none"> <li>Student Outcomes: critical thinking, communications, problem solving</li> </ul>	Establish baseline	Maintain or increase percentage	Maintain or increase percentage
	<ul style="list-style-type: none"> <li>Student Outcomes: usefulness of education in performing job</li> </ul>	Establish baseline	Maintain or increase percentage	Maintain or increase percentage

## Balance the Costs and Benefits of Post-Secondary Education

Priority	Performance Measure	Target		
		02/03	03/04	04/05
<b>Develop a New Tuition Policy</b> The Ministry works to develop a Tuition Policy to replace the tuition fee freeze.	<ul style="list-style-type: none"> <li>Dependent upon policy decision</li> </ul>	TBD	TBD	TBD
<b>Revise the Existing Funding Formula</b> The Ministry works to review and simplify the existing funding formula.	<ul style="list-style-type: none"> <li>Establishment of results-based block funding</li> </ul>	(New funding formula under development)	New funding formula announced	(Completed)

## Goal 2 — Economic and Social Development

### Reduce shortages in Strategic Skills Areas

Priority	Performance Measure	Target		
		02/03	03/04	04/05
<b>Increase High-tech Graduates</b> The Ministry works to address shortages in specific high-tech fields.	<ul style="list-style-type: none"> <li>Number of new computer science, electrical and computer engineering student spaces (FTEs)</li> </ul>	825  Target is to double the annual number of graduates in 5 years	825	825

Increase Health Care and Social Worker Graduates The Ministry works to address specific skill shortages in health care and social work.	<ul style="list-style-type: none"> <li>Number of new social/child protection worker student spaces (FTEs)</li> </ul>	20	20	20
	<ul style="list-style-type: none"> <li>Number of new RNs, LPNs and RCA<sup>1</sup> and other Allied Health student spaces (FTEs)</li> </ul>	653	471	369
	<ul style="list-style-type: none"> <li>Number of new medical school student spaces (FTEs) [8 new seats established in 2001/02]</li> </ul>	(New spaces being developed)	(New spaces being developed)	72
	<ul style="list-style-type: none"> <li>New medical facilities</li> </ul>	(Facilities being built)	(Facilities being built)	New facilities at UBC, UVic and UNBC

#### Expand Training and Skills Development

Priority	Performance Measure	Proposed Target		
		02/03	03/04	04/05
Increase Industry Training The Ministry works to increase general trades training and apprenticeships.	<ul style="list-style-type: none"> <li>Number of new training spaces</li> </ul>	(under development)	(under development)	(under development)

#### Expand Research Capabilities in the Province

Priority	Performance Measure	Proposed Target		
		02/03	03/04	04/05
Strengthen the Provincial Research Capacity The Ministry supports research and creative thinking.	<ul style="list-style-type: none"> <li>Number of Leading Edge Chairs funded</li> </ul>	20 Chairs funded over 4 years		
	<ul style="list-style-type: none"> <li>Funding support for research</li> </ul>	Funding for UBC Brain Research Centre	(Completed)	(Completed)

## Goal 3 — Responsive and Effective Management

### Improve Ministry Business Practices

Priority	Performance Measure	Proposed Target		
		02/03	03/04	04/05
<b>Management of Student Financial Assistance</b> The Ministry ensures the Student Financial Assistance program is delivered efficiently.	<ul style="list-style-type: none"> <li>Student aid application turnaround time (currently 19 working days)</li> </ul>	(Improvements underway)	12 working days	(Completed)
<b>Ministry Reorganization</b> The Ministry realigns itself to focus on core business and deliver New Era commitments	<ul style="list-style-type: none"> <li>Ministry program management budget as a percentage of overall Ministry budget</li> </ul>	Establish baseline	Maintain or reduce percentage	Maintain or reduce percentage
	<ul style="list-style-type: none"> <li>Minister's Advisory Board appointed</li> </ul>	New Board announced	(Completed)	(Completed)
<b>Reduction in Red Tape</b> The Ministry works to achieve the government's objective of reducing red tape by one-third.	<ul style="list-style-type: none"> <li>Regulatory requirements eliminated</li> </ul>	Contribute towards the government-wide goal of reducing regulations by one third by 04/05		

### Develop a Post-Secondary Education Accountability Framework

Priority	Performance Measure	Proposed Target		
		02/03	03/04	04/05
<b>Formalizing a New Accountability Framework</b> The Ministry works to develop a new results-based performance management system.	<ul style="list-style-type: none"> <li>Establishment of accountability framework</li> </ul>	Accountability framework announced	(Completed)	(Completed)

<sup>1</sup> RN = Registered Nurse, LPN = Licensed Practical Nurse, RCA = Residential Care Aides

# **POST-SECONDARY RELATED OBJECTIVES, MEASURES AND TARGETS FROM THE 2002 PROVINCE OF BRITISH COLUMBIA STRATEGIC PLAN**

## **1.A – British Columbia Will Have A Skilled Workforce**

Measure	Target
Percentage of the labour force with a post-secondary certificate or diploma.	Increase the percentage of the workforce with a post-secondary certificate or diploma from the 2001 baseline of 32.4%.
Percentage of British Columbia's workforce comprising persons employed in natural and applied science related occupations.	Increase the percentage of the workforce in natural and applied science related occupations from the 2000 baseline of 6.3%.

## **2. B – British Columbia Will Have Exceptional Educational Institutions**

Measure	Target
University completion measures the percentage of the population, aged 25 to 54, who have completed a university education.	Increase the percentage of university graduates in the 25-54 cohort from the 2000 baseline of 27.7%.

