



**UNIVERSITY
OF ALBERTA**

2023

What We Heard: Revisited

Building the Next University Strategic Plan Together

March 10, 2023



Prepared for the University of Alberta by



**Higher
Education**
STRATEGY ASSOCIATES



Higher Education Strategy Associates (HESA) is a Toronto-based firm providing strategic insight and guidance to governments, postsecondary institutions, and agencies through excellence and expertise in policy analysis, monitoring and evaluation, and strategic consulting services. Through these activities, HESA strives to improve the quality, efficacy, and fairness of higher education systems in Canada and worldwide.

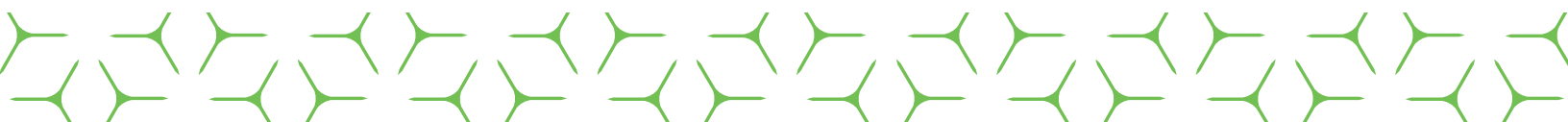
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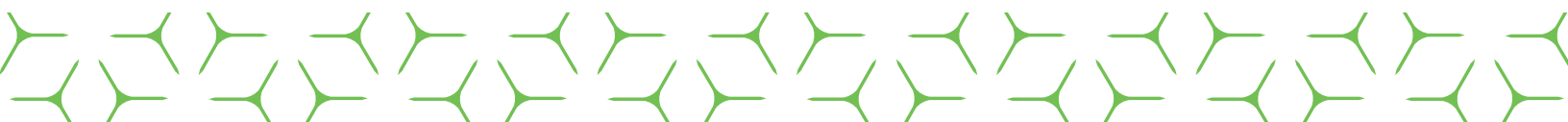
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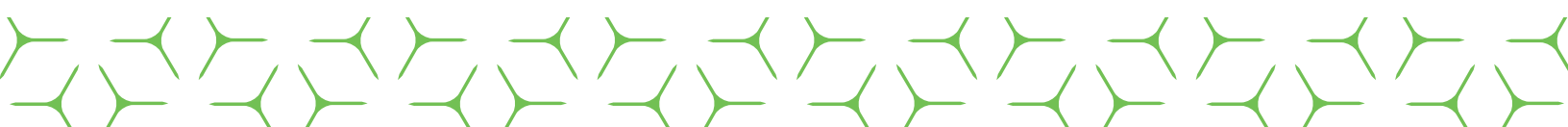


Note on the Revision

The original What We Heard Report was published on February 16, 2023. As the report aims to distill into very short form the essence of thousands of perspectives on what the University of Alberta is and ought to be, the exercise is necessarily a delicate endeavour that requires checking and validation.

With the publication of the document, we asked the community for their input on the degree to which the document resonated with them, the extent to which it captured the state of affairs at the university, and how the potential opportunities at its disposal might be best realized. We received feedback both through online form submissions and in-person group feedback sessions. The robust feedback has helped us refine the document so as to better reflect the aspirations of the university community. Most respondents indicated a desire to establish a greater purpose for the University of Alberta and that aspirations of institutional size and accolades were only valuable if they could be convincingly translated into success within the context of a higher purpose. That purpose, as suggested by the feedback, is to be a leader in shaping our global future through innovation and impact. Further, we received feedback that there needed to be a greater emphasis on a desire to lead in a way that was not limited to regional confines. Other contributions further help add nuance and shift the direction of the document slightly so that the final plan better resonates with what the community hopes to achieve.

What follows is an updated version of the report that reflects feedback obtained over the last two weeks. It adds nuance and features increased emphasis on key areas highlighted during the feedback sessions.



Introduction

Since fall 2022, the University of Alberta community has been engaging in a planning process to develop a new institutional strategic plan for 2023 and beyond.

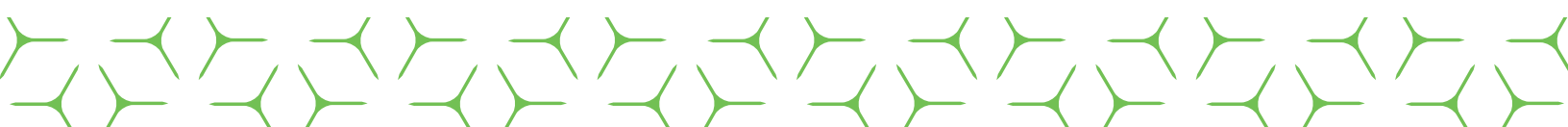
The strategic plan will articulate the collective ambition of the university, summarizing priorities and broad actions while still allowing the University of Alberta the flexibility to adapt and respond to significant emerging opportunities.

The University of Alberta's strategic planning consultation process has so far included the following:

- Key informant interviews with University of Alberta community members
- Key informant interviews with University of Alberta community and industry partners
- University of Alberta faculty, staff, and student roundtable sessions
- Student survey
- Staff survey
- University of Alberta Board of Governors retreat and Senior Leadership retreat
- Special engagement session with GFC
- A joint GFC-Senate-Board of Governors session

The consultations have not quite finished. However, there appears to be enough consensus about the elements of a plan that an outline of the way forward can be drawn. This document explains what has been learned so far and some ways in which a strategic plan could move things forward.

This document is not a draft of a strategic plan, but it is an important milestone on the way towards a new plan. It is a document that records the key findings from discussions that have taken place across the University of Alberta community over the past five months. The purpose of the document is to capture the common threads of the numerous discussions that have taken place about the University of Alberta's future and distill them into a common narrative.



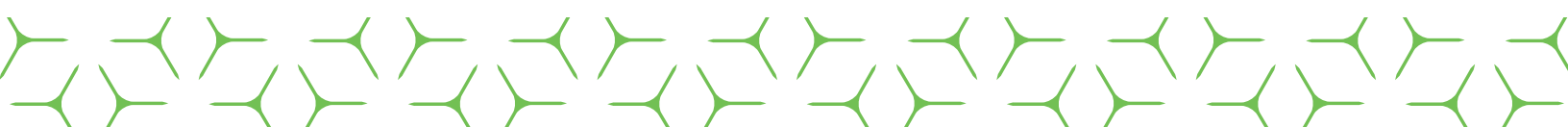
Community Pride and the Challenges of the Recent Past

The University of Alberta has the unmistakable privilege of being a source of pride not only for those who work hard every day to make the institution better and for those who benefit from the cachet of having attended the institution, but also for the community that surrounds it.

During consultations, it was clear that the university's presence was considered by all to be a strong net positive, and that the province of Alberta is enriched by the presence of the University of Alberta. This was true even when some had difficulty supplying specific proof points of why this was the case (the most frequent responses were examples of external approbation, such as rankings and the award of a Nobel Prize).

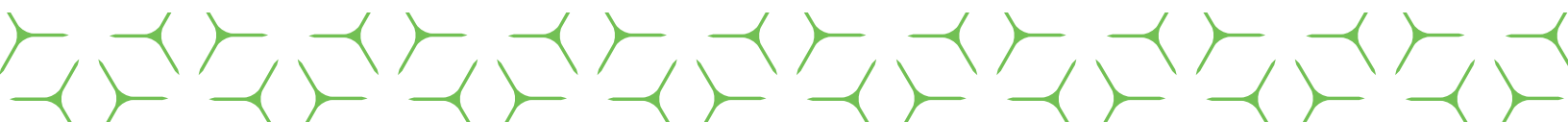
Both the internal and external consultations with interested parties showed a strong desire to see the University of Alberta thrive, inspire greatness, reach new heights, and continue to be a source of pride for the region. It is understood above all that the University of Alberta is a key talent magnet for the region, not just in the sense that talented people come to the university but also that having a thriving world-class university is an asset that helps others in the region attract highly qualified personnel as well. However, externally, the institution is not always seen as a leader or a strategic actor or partner. Among community members, rising admission requirements are seen as an example of the university raising its gates and becoming inaccessible to the very people who have historically funded it. In business, it is seen as somewhat difficult to work with, and in government, it is seen as less focused on areas of specialization and less able to leverage its strengths than other leading regional universities. It is seen as a good partner by other community groups in the areas in which it chooses to engage, but it is not necessarily a strategic actor engaged in long-term city building, nor is it seen as playing any kind of convenor role in economic and civic affairs. These perceived deficiencies do not detract from the sense of pride Albertans have for the institution. However, we heard that the muted community response to the government cuts of the last few years, which were very demoralizing to staff inside the university, very likely stems from them.

Within the university, the pride and the accompanying desire for greatness are accompanied by despondency resulting from the consequences suffered in the wake of massive cuts to government operating grants. In staff consultation sessions, the most common theme was that the University of Alberta is still adjusting to the new One University structure, and there is a great deal of skepticism that the sacrifices



made in the service of the new structure have yielded any positive results. Particularly among staff whose day-to-day work environment and structure have been greatly impacted by the restructuring, and much time and energy are still being spent making the new structure work, there remains lots of anger at the loss of colleagues and supports that made working at the University of Alberta desirable, making it difficult in the short-term to think about a more distant future, no matter how potentially bright. More specifically, on the academic side, many find the notion of new opportunities difficult to imagine now that many resources formerly available at the university are no longer accessible. As a result, a common sentiment was that the university's prospects are not improving and that its future was likely to be one of mediocrity rather than excellence.

This may not sound like encouraging ground on which to build a strategic plan, but there were some very promising contributions. When discussing how the institution was doing, the prevailing sentiment was that the university's accolades and rankings are proof that the university has what it takes to compete with any prestigious public institution. Its work on Indigenization and decolonization as well as equity, diversity, and inclusion were frequently heralded as achievements that spoke to a collective commitment to shaping a better future and practicing discovery and creative pursuit with integrity. In particular, its laudable international reputation for quality and research excellence, expressed largely through pride in how the university performs in rankings and the prestigious awards its researchers have collected, communicates a real commitment to quality and a deep desire to contribute globally to making progress on the most pressing issues and opportunities with which the world is contending. In discussing these achievements, participants repeatedly suggested that the University of Alberta could surpass its own past achievements. Additionally, those future achievements needed to build on the image the university has for itself as a research-intensive university that contributes meaningfully to the development and progress of knowledge and to the future prosperity of Alberta, contributing to the region's position on the global stage.



Emerging Themes

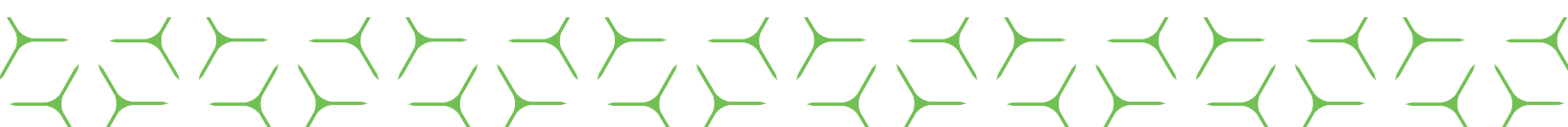
As participants looked to the next decade, they expressed a deep desire for their work to be more compelling and more relevant to society. Throughout our surveys, focus groups, and interviews, we heard a great deal about what it would mean to be a thriving University of Alberta.

Most accounts focused on broad themes – a university supported by its people, inspirational research, growing with the province and a flourishing for a greater Alberta—on which we will expand below. There is some overlap between these themes, and they implicate students, staff, and faculty in different ways. Supporting these three themes are important commitments to Indigenization & Equity, Diversity, and Inclusion, as well as the people of the University of Alberta. It should also be noted that, as befits an exercise with wide engagement, there are themes and findings on which there is little or no consensus; different views and approaches are noted as needed.

OUR PEOPLE ARE OUR FOUNDATION

Evident in consultation was that to fulfill the university's ambitions, the university needs to create an environment conducive to a collective flourishing. The proof of an institution's greatness in this context is in its ability to create the conditions that will allow individuals and groups to thrive. While prizes and other forms of recognition of achievement are typically bestowed upon an individual or a small group, the necessary conditions that create the possibility for greatness are the result of a set of conditions and a systemic environment that facilitates and encourages success and wellbeing. Success at the University of Alberta is inextricably tied to the development and support of a capable and empowered staff that is provided with the conditions necessary to thrive in the workplace. The university needs to support an outstanding experience for its people, investing in their growth and development, making them feel valued for their contributions, and taking tangible steps to enhance the organization's culture, morale, and engagement.

There was a general desire for stability expressed by many of the respondents. Many commented that their teams, or themselves, were running at full capacity and that there was little time and room available for new initiatives. Often, creativity and innovation require a controlled flexibility that allows for experimentation, which is possible mostly in an environment of professional certainty. For the University of Alberta to thrive and meaningfully take its place as a global leader in academic development and global progress, institutional stability is required.



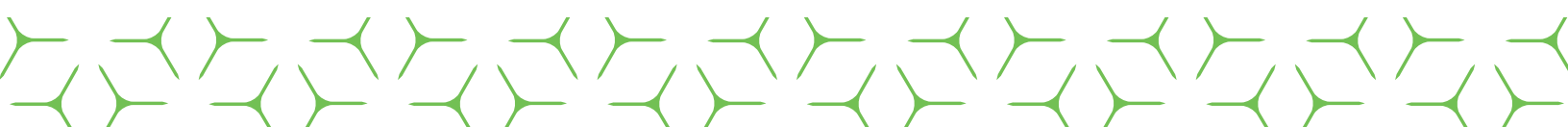
INSPIRATIONAL RESEARCH: A GLOBAL IMPACT, BUILT AT HOME

Improving the university's global standing and performance was a clear aspiration for many participants. Improving the university's global standing was not a laudable end in itself, however. Participants pointed to the university's global standing and the external recognition researchers received as proof points that the university was driving advancement in knowledge, innovation, social progress, and creativity in the province, the country, and the world. If there is an area of unanimity in the consultations, it is that the University of Alberta needs to remain a strong research university across all fields of study. However, external informants from the scientific community were unanimous in saying that, on top of that, the institution needed to choose and invest strongly in a few areas of signature excellence. This was not simply because the concentration of resources in a few areas is the shortest way for an institution to attract positive attention to itself within the academy. It was also because the act of finding focus indicates to government and philanthropists that an institution is capable of prioritization (an area where outside observers do not rate the University of Alberta very highly). When discussing where the University of Alberta could make the greatest impact, most spoke of globally recognized achievements in areas of traditional strength such as energy, health and artificial intelligence. Internally, of those who agreed that focus would help the University of Alberta make a real impact, most were adamant about the university's imperative to contribute meaningfully to decolonization, nurturing a democratic society, advancing energy transition, and mitigating the impacts of climate change.

Improving research outcomes would likely require greater support and recognition for faculty with significant research records and contributions. In part, we heard that that means creating an environment that is collegial and collaborative, a place that enables high levels of individual and collective performance, and one that supports the development of successful and rewarding careers for all those at the university. While there was a recognition that global challenges require global solutions and oftentimes the coming together of many different domains, there was a strong sense internally that the university should allow for an epistemic culture that values the contribution of individual disciplinary fields as applicable in addition to interdisciplinary knowledge generation. The overall tenor was that, above all, ambitious challenge-led or curiosity-driven research undertaken to the highest standards of rigour and integrity has the potential to create the greatest impact.

It was clear that the current structures that incentivize research at the university are less designed to foster high-impact research than to encourage the volume of research. The time-consuming FEC process, which is widely perceived to promote quantity over quality, is an example of a structure that could be adjusted to better incentivize research outcomes.

While internally, conversations about research focused on increasing activities within the university to promote additional productivity and reach specific objectives, it is clear that the university's international partnerships are a huge asset to the university and crucial



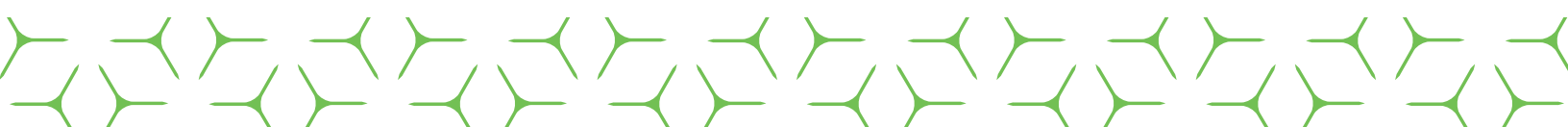
to its continued development as a research-intensive university. International partners reported that exchanges between the University of Alberta and partner institutions were mutually beneficial and that their strength was in their intentional development for the mutual benefit of participants. When asked about their benefit and potential, partners pointed to how they advanced discovery and creativity, with an emphasis on how these are integral to ensuring either participating partner is plugged into global academic discourse. To participate in academic discourse at the highest levels, the University of Alberta must be placed within a global network of exchange of ideas.

Finally, strong graduate student support is needed to advance the University of Alberta's research goals. Improving research performance requires a strong graduate student population. However, many indicate they are losing graduate students because they cannot offer competitive stipends or otherwise make coming to the University of Alberta attractive. While the cost of living in Edmonton or Camrose is lower than in many other Canadian metropolises, top American schools are luring Canadian talent with better offers. Graduate students involved in research require strong supports in carving out paths for careers outside of academia, as well as institutions that can credibly offer students ways to leverage their research experience at the university into meaningful careers in industries.

RIISING TO THE OCCASION: MEETING THE PROVINCE'S NEED

There is little doubt that the University of Alberta will need to grow substantially over the next decade. While some questioned the need to grow at all, sometimes pointing out that size does not necessarily correlate to quality, there was a resounding sense among the university's external stakeholders that the university needed to grow to meet demand for its services. The university has already made a commitment to grow, but our consultations revealed that it is likely to need to grow even more. The proportion of 0–14-year-olds in Alberta is higher than the national average at 24.9% (compared to 20.9%), and while the country is looking at an increase in the number of 18-year-olds over the next five years, in Alberta the numbers of young people are projected to continue rising well into the 2030s. This is coming at a time when many are already saying that the University of Alberta is failing to uphold its social obligation to provide a quality education to many Albertans because, as reported through several consultations, it is simply too hard to get into. Many fear having to leave the province to obtain a good education, which could consequently result in an exodus of some of the province's promising youth. Already, Albertan youth who pursue university education leave the province to pursue higher education elsewhere at a higher rate than anywhere else in the country. Growth was also articulated as a means of addressing what some identified as gaps in accessibility. Increasing student enrollments from these populations will be one part of the equation in meeting growth targets.

This growth will need to be carefully managed. When confronted with the hypothetical scenario of significant growth at the University of Alberta, many raised concerns about personnel capacity in light of recent cuts and infrastructural limitations. There is a high level of skepticism over the feasibility of implementing growth well due to a



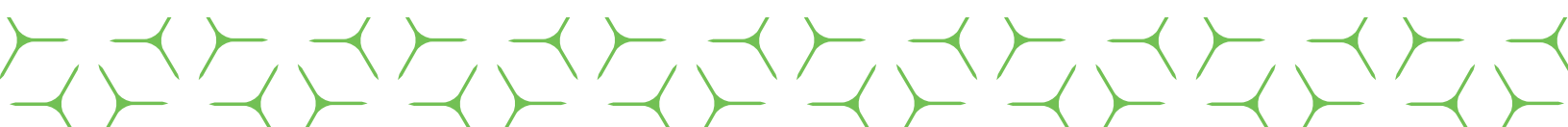
long-term lack of government funding for the University of Alberta and the insufficient surplus generated by additional revenue to support increased enrolment at current tuition levels. Specific concerns included the inability to hire enough faculty and staff to accommodate growth, a lack of study space for students, a fear that it would be even more difficult to access specific course sections, that transit to the university (which many noted is already lacking) could not support an increase in the student population, and the detrimental effects of potentially larger class sizes. Many, however, suggested that some of the concerns raised could be addressed by significantly increasing the number of online offerings. There were differences of opinion about whether this would be a good strategy or a pitfall to avoid. Students were, for the most part, fairly positive, with many saying that they preferred a mix of in-person and online courses. Proponents indicated that online education (full or partial) helps with access and flexibility, particularly for students with a part-time job and those living off-campus who find the commute to campus too expensive or time-consuming. On the other hand, many staff articulated that online learning could be correlated with a drop in overall quality.

There was an overarching consensus that the student experience was crucial to how people perceived the quality of education at the University of Alberta. In thinking through the ways in which the University might grow, it will need to pay very careful attention to, and prioritize the student experience so as to ensure that growth does not come at the expense of quality or of the opportunity to create meaningful connections between their peers or with the university through engaging in shaping its future through both formal (committee) and informal (providing feedback in public forums) mechanisms.

The nature of the investments in student experience will differ depending on the type of growth pursued. For instance, should online be preferred, it is worth noting that online courses have typically had lower student persistence, which has implications for growth and the University of Alberta student experience. The student experience will need to be carefully considered and prioritized on campus as well. Concerns around accessing classes, overcrowding, affordability of campus services, availability of housing, and finding study space are but some of the issues that the University of Alberta will need to address in its quest to meet the coming demand for a University of Alberta education. Just like the university needs a thriving staff to support student and professorial success, a robust student experience is integral to ensuring that a future University of Alberta is associated with quality as well.

FLOURISHING FOR A GREATER ALBERTA: WHERE TALENT WANTS TO BE

In the 21st century, no university can ascend to greatness alone; it is always done through deep, symbiotic interaction with a thriving economy and community that surrounds it. But this does not currently describe the state of relations between the University of Alberta and its community partners. There is a notable disconnect between how the University of Alberta community views its relationships with its partners and how those partners talk about their partnership and opportunities with the University.



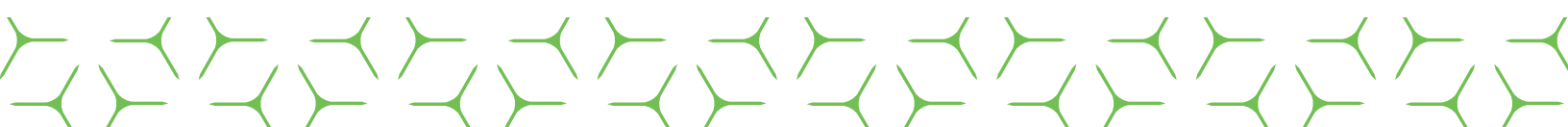
Within the business community, two things were striking. First, they said that research performance and connections with corporate R&D were not very high on the list of things for which they thought the University was useful. By far and away, the first priority was the university's teaching mission and the production of talented young graduates. There was also a desire to see the university be more active in trying to attract firms to the region, but the emphasis here seemed to be more about the University of Alberta giving the city a "cool", "knowledge-based" backdrop rather than holding it out as a possible R&D partner. Second, that business found the University of Alberta a sometimes difficult and confusing partner with which to deal.

Feedback from the government tended to be more positive about the university's research, discovery, and innovation role (including in social innovation), mainly in the sense that they saw parts of it as a tool with which to develop Edmonton's private sector and provincial economic diversification. In general, it is seen as a good partner but not a great one. Its engagement is seen as tactical and mainly undertaken in self-interest. It is not seen as a strategic partner, one that builds lasting alliances for the benefit of the city. Neither is it seen as using its convening power to take a leadership role within the community on key issues of either social or (particularly) economic import. In a city with a relatively weak private sector, the university can play a significant role.

When speaking to the University of Alberta community, there was a clear sense that the way in which the university engages with its communities — including Edmonton, Camrose, the francophone community, Indigenous communities, and, international partners — as well as other external partners is an important part of its core reason for being, as it is both one of the activities that is most commonly articulated as a source of pride and also one of the areas most commonly cited as needing improvement. A few harkened back to a past when the university was much more involved in local development and signalled a desire for the University of Alberta to be a more central presence in the city and province, working towards mutually beneficial outcomes. There was an overall sense that what the university does outside is valuable, and that it needs to continue these efforts, which was at odds with how community members outside the university spoke about the university's efforts. There is a deep need to expand not only the impact but also the scope of the partnership opportunities for there to be meaningful dividends for all partners.

INDIGENIZATION & EQUITY, DIVERSITY, AND INCLUSION

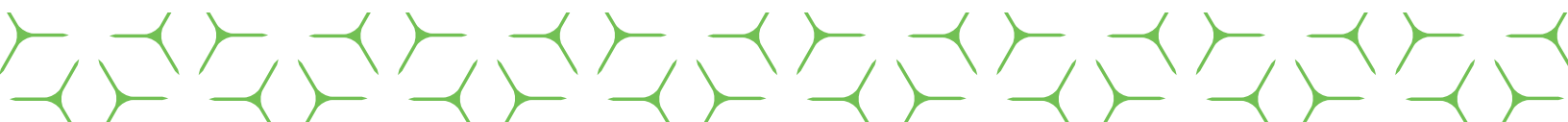
Threaded through all three issues listed above were issues related to increased Indigenization and equity. Indigenization and decolonization, as well as equity, diversity, and inclusion, are distinct categories of intervention in which the University has an opportunity to continue to effect meaningful change. However, responses spoke to the interrelationships between the two and illustrated how each was mutually reinforcing. The growth of the university was seen as an opportunity to reach out in particular to Indigenous communities and raise participation among under-represented groups. The commitment to partnerships with local communities is not limited to municipalities such as the City of Edmonton; some participants also underlined that it means deep



partnerships with First Nations and other Indigenous groups in the lands of Treaties 6, 7, and 8 on projects designed to help these communities flourish. And while not all areas of research excellence need have a local focus, some informants noted that the pool of talent in Native Studies and northern affairs generally has potential as an area of concentration and excellence. The university has made substantial strides in Indigenization and decolonization across the university and the Faculty of Native Studies has done substantial work in advancing academic work on Indigeneity and decolonization. Both have distinct but necessary contributions that make the University of Alberta a university that makes meaningful advances in decolonization.

While this field represents a clear thread across the three earlier themes, it has resonance as an independent theme as well. Many participants articulated that their pride in the University of Alberta was at least to some extent dependent upon the extent to which it took seriously commitments to equity, diversity, and inclusion, as well as Indigenization. There is thus a significant desire in some quarters that the university move beyond issues of increased representation to examine ways in which the university might engage in critical self-reflection about practices that lead to exclusion.

There was recognition among community members that the university has made significant progress in advancing equity, diversity, and inclusion as well as Indigenization through the development of both Braiding Past, Present and Future: University of Alberta Indigenous Strategic Plan and the University of Alberta's Equity, Diversity, and Inclusion Strategic Plan. Braiding the Past, in particular, was the result of decades of work and is a testament of both how far the university has come and how far it has yet to go. In the responses, it was clear that these plans demonstrated a valuable commitment by the university. As a result, some articulated that the university simply needed to continue its work in this area, though others also specified that the plans' implementation must succeed — a feat that would only be possible through the commitment of significant resources towards enabling their implementation. Others still, described specific initiatives, such as hiring more people into leadership positions from equity-deserving populations (including Indigenous populations) and funding more scholarships for students from equity-deserving populations, as tangible ways of advancing EDI and Indigenization. There were a myriad of other suggestions, including designing and offering programs that would benefit Indigenous communities and developing processes to ensure Indigenous people and communities would be integrated in areas central to designing and implementing processes across the institution. Overall, these all pointed to a desire to see the university continue to genuinely embrace the values of, and engage with, the advancement of these initiatives in the interest of creating a better University of Alberta.



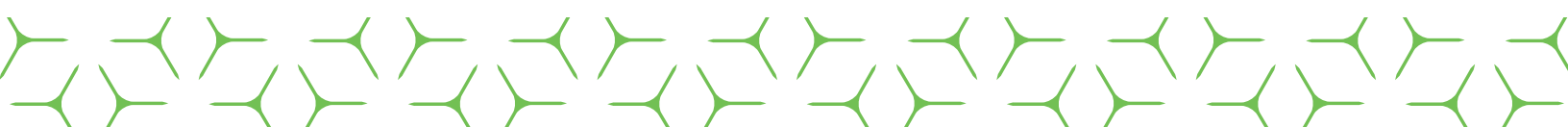
Final Thoughts: An Ambitious University for an Ambitious Community

From the foregoing, the shape of a possible strategy begins to emerge.

The University of Alberta can set the standard of what it means to be excellent and relevant to society and humanity. Through greater focus, more aggressive pursuit of funds, and changes to internal processes, it can pursue greater research intensity and impact and serve a broader population of students. And by exploiting strategic partnerships and exercising the university's leadership and convening role, it can work to diversify and dynamize the Albertan economy and help bring communities across the province to a flourishing, healthy future.

In taking a central role in shaping the future of our world through high-calibre discovery, innovation, and creativity, the University of Alberta will be the pride of and the catalyst for a re-invented province of Alberta and the aspirational model for a high-impact research intensive university.

No doubt, this will be a large undertaking, perhaps made more difficult by recent events and a tougher financial outlook. But the University of Alberta has undergone major setbacks several times in its 115-year history, and every time it has come back bigger and better. It will do so again.



Appendix 1: Methodology Notes

This summary report is the culmination of several rounds of consultation with the internal community and the University of Alberta, including faculty, staff, and students. This included over 30 group sessions with hundreds of participants as well as other stakeholder engagement sessions outlined in the introduction. Additionally, external consultations took the form of individual interviews with industry and community partners, as well as government representatives, conducted by HESA team members. Participants were offered the opportunity to consult with us in confidence if we thought this would be helpful in ensuring a full and frank exchange of views.

Questions posed to all participants were open-ended to allow for issues and opportunities available to the University of Alberta to emerge. Our team took extensive written notes during the consultations, highlighting themes of interest to which we returned in analysis.

For this exercise, the HESA team relied entirely on qualitative coding rather than charting the frequency of keywords, as we were in a position to make judgments about the importance of themes in real time while collecting the data. We identified distinct themes from our conversations and considered their importance in context given the natural flow of conversations. In later engagements, such as the survey, member checking, or engagements with external stakeholders, we sought to validate impressions that were unearthed during initial consultations.

We used this process to identify the key themes around which we could construct a narrative about the university's strengths and challenges, as well as its likely prospects for the future. This narrative reflects a distillation of the feedback received based on HESA's experience in strategic planning. The resulting report is a culmination of results so far but is not final. The questions that accompany this report, for instance, are in themselves another way in which HESA seeks to validate the conclusions drawn from consultations so far, and feedback will serve to inform the contents of the strategic plan.

