

## CONTINUING EDUCATION UNIT REVIEW

### Summary Report

The Site Visit of the Unit Review Team for Continuing Education took place from February 23-24, 2017. The Unit Review Team consisted of:

Andrew Cochrane, Dalhousie University  
Heather McRae, MacEwan University  
Judith Potter, McGill University  
Hugh Evans, University of Calgary

Following the Site Visit, the Unit Review Team prepared a written report containing comments and recommendations. Continuing Education subsequently provided responses to the recommendations. General comments and the recommendations and responses follow.

### General Comments of the Unit Review Team

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Although the report will delve more fully into each of the relevant topics for analysis, the Review Team offers several general observations that may help to frame the report and the subsequent recommendations.

**First**, it is clear that UCCE staff are working very hard and have a strong commitment to creating the organizational structure, processes, programs, delivery mechanisms and services needed to be a successful and collaborative University Continuing Education (UCE) operation. They also appear to be fatigued and are very much looking forward to a more stable environment.

**Second**, the ship continues to float, even while there is a course correction underway and, indeed, while the engine is under renewal. Courses continue to be offered and learners served. Some collaborations are emerging with other U of C units, notably Executive Education. Difficult adjustments have been made to ensure fiscal responsibility, even in the face of declining business.

**Third**, UCCE faces significant internal challenges, with reportedly low visibility within U of C Faculties and Schools. The Director does not sit at the Deans' table where she could interact as a colleague and contribute to the overall academic discussions of the University (she is a member of Extended Deans—a much larger group with a different mandate).

**Fourth**, the Review Team did not get a clear sense of the positioning of UCCE within the academic mission of the University or its strategic plan.

**Fifth**, the downturn in the economy is a potent force at present, which places greater emphasis on the need for the University and UCCE to take the longer view in considering the role, mandate, strategy and structures of the unit. Focus should be placed on anticipated emerging needs and on how UCCE can add breadth and value to the implementation of University priorities, e.g. access initiatives, internationalization, community engagement, creating lifelong connections with alumni.

**Finally**, while the UCCE Self Study and the onsite interviews were enormously helpful to the understanding of UCCE and its realities, the Review Team was somewhat concerned by the internal focus of both the documentation and the onsite meeting agenda. In the original schedule, there were no sessions arranged with groups that would typically be included, for example, U of C Faculties, UCCE instructors, UCCE students (beyond ESL), community members and partners. We very much appreciated the last-minute efforts to address some of these lapses, but observe that UCCE may need to expand its focus while still dealing with the internal necessities. We, therefore, include recommendations that would encourage external participation, communication and awareness-building to the benefit of UCCE and the University.

## Reviewer Recommendations and Unit Response Follow-up

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### Area of Recommendations: Organizational Structure

#### Reviewers Recommendation 1:

*“Understanding that there is no perfect organizational structure, put forward and implement a plan for an organizational structure that meets the criteria above and can be stable for at least two years.”*

#### Continuing Education Response:

We agree that there is no perfect organizational structure and that organizational stability is desirable. However, due to economic conditions, the context for Continuing Education at the University of Calgary has shifted dramatically during the last few years. In response to significant shifts in the external market and a related 21% reduction in enrolment, Continuing Education has gone through significant change, both in operational processes and organizational structure. The review team came mid-stream, in the midst of these organizational changes.

In alignment with our vision of Continuing Education, a new organizational structure, clustering all operational activities under an Associate Director Operations and bringing together all Programming teams serving domestic markets under an Associate Director Domestic Programs took place in early 2017. Further, additional scalability has been built into the new structure by maintaining a core group of operational staff and adding a small complement of part-time and casual staff during high demand periods, such as peak registration time. The intent of these structural changes was not only to maintain financial viability, but to streamline our program development and delivery processes while increasing the consistency and quality of program delivery through the reduction of silos.

As a responsive educational unit, within the University of Calgary, it is believed that this design will create core unit stability while maintaining the flexibility needed to effectively respond to seasonality and market demand.

#### Reviewers Recommendation 2:

*“Support from senior management is needed if UCCE is to fully participate in the academic mission of the University. To raise the profile of the unit and to encourage collaboration, consider a more impactful title for the unit. Likewise, consider including the Director at the Deans’ table.”*

#### Continuing Education Response:

Continuing Education is not a traditional academic unit and the roles and mandate of continuing education units across the country and beyond vary dramatically. UCCE currently offers a broad range of programming and community programs in support of both academic preparation (upgrading and English Language) and professional and personal interest non-credit programming in support of our institutional teaching mission and community engagement goals.

UCCE has consistently expressed our openness to exploring opportunities to support and partner with academic units to further support the academic mission of the institution. In light of institutional diversification and recruitment priorities and with the support of the Provost, Continuing Education is particularly interested in expanding our collaborative role with faculties and other academic units to create access to pathway/bridging/preparatory programs for a variety of marginalized groups.

UCCE agrees that a more impactful title would be beneficial and has been conducting internal discussions regarding a possible name change for the unit. The title, “University of Calgary Continuing Education”, full stop, is not consistent with the nomenclature used in any other institutions nor is it particularly impactful in creating a recognizable identity and brand in the external market. Ideas such as the “Centre for Professional and Continuing Education”, the “School of Continuing Studies”, and others have been explored within the unit. However, it is understood that a title change for the unit could not be done without broader consultation, reflection on internal institutional nomenclature and the support of the Provost’s office.

As a constantly evolving non-traditional unit, finding the right place to structurally support the work of Continuing Education has its challenges and may change over time. Currently, the Director of Continuing Education does participate as part of the Extended Dean’s meetings, as a member of the institutional Senior Leadership Team, a member of General Faculties Council and as a member of Senate. Further, the Director participates in the Dean’s Academic Leadership Academy. Based on UCCE’s current mandate, the Director of Continuing Education believes the status quo does provide adequate collaboration/communication channels to the academic community, Deanery, Senior Leadership and broader community.

#### **Area of Recommendations: Governance**

#### Reviewers Recommendation 1:

*“For identified program areas, establish Program Advisory Committees with defined Terms of Reference. Membership could include industry experts, faculty members from related areas within the University, instructors and students/graduates.”*

**Continuing Education Response:**

Continuing Education agrees with this recommendation. As outlined in Continuing Education’s self-study this gap had been identified and an action plan is in place to establish Advisory Committees for key certificate programs by the end of 2017-18.

**Reviewers Recommendation 2:**

*“With regard to the governance policy that draws a hard line between credit and non-credit, with UCCE only permitted to develop and deliver offerings in the non-credit sphere, the Review Team suggests that this may be the opportunity to rethink this approach. In our experience, UCE is successful when it is driven by a knowledge of our constituencies and their needs rather than by hard line policy decisions.”*

**Continuing Education Response:**

We are unaware of any internal policies governing non-credit versus credit work. This is an internal practice, more than a policy, which in part has been dictated by the Provincial Ministry and our mandate statement, which does include Continuing Education.

Continuing Education has identified numerous opportunities to expand our service to both the institution and our broader communities within our non-credit teaching and community engagement mandate.

If it is deemed of value to the academic community, UCCE is open to working collaboratively on professional continuing studies programs that serve the lifelong learning needs of our institutions’ graduates and to supporting online education where appropriate.

**Area of Recommendations: Staffing and Personnel**

**Reviewers Recommendation 1:**

*“In upcoming hiring opportunities, look specifically for candidates who bring knowledge and skills in innovation, entrepreneurship, market research, business development and program development.”*

**Continuing Education Response:**

Agreed! Two key positions have been filled in last three months, with strong candidates that have these skills. As indicated in the self-study, significant professional development has been and still is being undertaken to ensure existing staff are appropriately trained for their roles.

#### Reviewers Recommendation 2:

*“From the broader U of C perspective, and taking into account policy and labour relations realities, consider the introduction of key (non-tenure track) academic positions (with a programming /teaching/academic administration focus) into UCCE. Consideration might also be given to joint appointments.”*

#### Continuing Education Response:

As noted above, UCCE would benefit from academic staff knowledge in both the development of curriculum and within program advisory committees. As outlined in response to recommendation #1, we are in the process of establishing other advisory committees and we hope to name academic colleagues to these committees.

### **Area of Recommendations: Student Enrolment**

#### Reviewers Recommendation 1:

*“Consider other populations valued by U of C that UCCE could, either alone or through strategic partnerships, attract to the University by meeting their learning needs.”*

#### Continuing Education Response:

Agreed. Continuing Education has identified two broad areas to expand our program offerings. First, in light of anticipated changes to the Alberta Designation Requirements, new opportunities to bring international students to the University of Calgary for non-credit professional certificate training are now possible. Further, as identified above, UCCE believes there may be value in partnering with other academic units to provide pathway and bridging programs for marginalized groups.

#### Reviewers Recommendation 2:

*“Review data related to part-time enrolments in degree programs with a view to determining whether this population is being well served through current arrangements.”*

#### Continuing Education Response:

This is a broader university conversation, to ensure that we are meeting the needs of students and the university. UCCE is open to being a partner in service delivery where appropriate.

### **Area of Recommendations: Domestic Programing**

#### Reviewers Recommendation 1:

*“Amend current policy requiring non-credit certificates to be greater than 100 hours in length or create a new credential (i.e. Professional Development Certificate) to address market interest in shorter programs. Consider reformatting key certificates that are currently longer than 200 hours into shorter “stackable” certificates (i.e. introductory and advanced).”*

#### Continuing Education Response:

Similar to the consultation and work done on the credit credentials framework, the need for a non-credit credentials framework and the market demand for “stackable” certificates has been identified by both Continuing Education and Provosts office.

As agreed with the Provost, the Director of Continuing Education will pull together a working group with representation from academic units providing non-credit credentials to consult with the academic community regarding “non-credit programming at UCalgary”.

The purpose of the working group is to propose a non-credit credential framework and a process oriented white paper providing recommendations based on the community consultation.

#### Reviewers Recommendation 2:

*“Appoint UCCE as the home of innovative partnerships and certificates relating to professional development programming including the management of badges and non-credit certificates.”*

#### Continuing Education Response:

This is a broader university conversation that needs to be explored.

#### Reviewers Recommendation 3:

*“Establish “signature” programming within UCCE that connects to and strengthens the University’s mission and mandate. Request the appointment of “expert advisors” from Faculties and Schools (as part of their faculty service requirement) in specific programming areas in order to strengthen the connection between UCCE and the research and community service mandate of the University.”*

#### Continuing Education Response:

Agreed. “Signature” programming that links UCCE to the university mission and generates positive brand recognition is of value. UCCE is currently working with internal and external colleagues and organizations to develop programming in alignment with UCalgary signature initiatives. These include mental health, sustainability and indigenous focused initiatives.

As discussed in two previous recommendations, we are working on appointing academic colleagues to our program advisory groups.

#### Reviewers Recommendation 4:

*“Develop a framework for IP that allows UCCE to scale up programming as needed and ensure that programs and courses can be offered by different contract instructors.”*

#### Continuing Education Response:

Continuing Education has recently identified curricular intellectual property ownership goals for non-credit programs. Funds to support phase I implementation of these goals have been identified and approved.

To assure quality, consistency and, where needed, alignment to professional association requirements, the goal is to template all “core” non-credit certificate courses and have the IP owned by Continuing Education. Guided by input from an Advisory Committee, these courses will be authored by a subject matter expert(s) working with an Instructional Designer to ensure both course and program outcomes are met in the design.

We are aware that the University of Calgary IP policy will be reviewed in the upcoming year and we will ensure Continuing Education is consistent with this policy.

#### Reviewers Recommendation 5:

*“Increase efforts to expand the target market and lessen dependence on Calgary as a market through more online offerings.”*

#### Continuing Education Response:

Continuing Education’s mandate and role within the University of Calgary is very tied to our institutional commitment to community engagement and in particular the learning needs of Calgarians.

Continuing Education continues to develop new online courses and migrate existing high demand courses and programs into an online format, however they are primarily targeted to local learners. Over 20% of UCCE course enrolments are online and 22 of our certificate programs can be completed online.

However, it should be noted that while online courses can be taken by individuals in different markets, 89% of our existing online learners are in the Calgary area. As indicated in our student surveys, online is desirable for scheduling flexibility and modality preference. It is one of the main reasons they choose UCCE.

Further, promoting to and recruiting learners from markets outside of Calgary, is expensive and not always in the best interest of the public. In most cases, similar professional education courses can be acquired through their local institutions.

While diversification is an important focus, we do not believe developing additional online courses targeted to other markets is the right course of action for Continuing Education. Consistent with the key roles of UCCE, local community engagement and provision of lifelong learning programming is our primary focus.

### **Area of Recommendations: English Language Programming**

#### Reviewers Recommendation 1:

*“An integrated approach to language training with a harmonized approach to complementary targets and delivery needs to be considered. UCCE take a lead role in the recruitment and instructional provision for ESL and EAP learners while Werklund focus on conditional acceptance/pathway programs in collaboration with other Faculties (i.e. Engineering and Business).”*

#### Continuing Education Response:

Continuing Education has worked collaboratively with both Werklund School of Education and the Provosts office to recommend changes intended to create clear options for English language learners at the University of Calgary. Proposals for aligned changes to both Continuing Education and Werklund School of Education programming were submitted to APPC on June 13<sup>th</sup>.

#### Reviewers Recommendation 2:

*“A further suggestion to consider is that UCCE share responsibility for international recruitment (for a stipend from the U of C) for undergraduate programs and work in consultation with the Registrar’s Office regarding admission requirements and participation in international fairs in order to provide “instant offers to the U of C”. This would likely encourage a higher response rate in a very competitive marketplace.”*

#### Continuing Education Response:

UCCE works in close collaboration with the Registrar’s office and Graduate Studies in aligning recruitment tactics; marketing initiatives are held in conjunction in priority markets and are cross-marketed, with leads being shared, in secondary ones. It is expected that with the approval of the Academic Communication Certificate (proposed at APPC June 13<sup>th</sup>) that there will be greater alignment with the Registrar’s Office and further collaboration.

The University is currently coordinating international recruitment activities campus-wide and Continuing Education is part of these discussions.

### **Area of Recommendations: Budget**

#### Reviewers Recommendation 1:

*“Review the balance of non-programming staff to program staff to ensure administrative costs do not exceed revenue generating ability.”*

#### Continuing Education Response:

In response to challenging market conditions, Continuing Education has reduced its staff by approximately 15% in the past 18 months and has been successful at managing costs in relation to declining revenues. However, the specific balance between non-programming staff to program staff is not one that has been specifically reflected upon. Continuing Education will seek out benchmarking information to identify if there are irregularities or opportunities for an appropriate ratio of non-programming to programming staff.

#### Reviewers Recommendation 2:

*“In marketing, the ratio of marketing budget to revenues is comparatively high (Canadian UCE benchmark is 5-7% of revenue. While we understand the attachment to a paper based guide, most CE operations have transitioned to a lighter guide which pushes new clients to the website.”*



#### Continuing Education Response:

UCCE's overall ratio of 8-10% is in line with best practices published by UPCEA (University Professional and Continuing Education Association) and LERN (Learning Resources Network) – the two largest professional associations tied to the practice of Continuing Education in the United States.

It's believed the reference of 5-7% is based on the CAUCE (Canadian Association of University Continuing Education) self-report benchmarks. The CAUCE reported benchmarks typically do not include Marketing and Communication staff salaries, as these functions are often provided centrally or reported separately. UCCE's ratio does include a small dedicated Marketing team.

As noted in the self-study, UCCE has been transitioning from paper based to digital communication channels. Additional moves towards yet lighter guides that push learners to the website are underway. UCCE also launched a new website in 2016-17, enhancing the "shopping cart" experience for UCCE learners.

UCCE believes both our marketing cost ratios and current targets of 50-60% of enrolments being completed online, via our website, are appropriate for the diverse group of adult learners we serve. These targets may change over time, in particular as more millennials move out of traditional post-secondary and into lifelong learning programming.

#### Reviewers Recommendation 3:

In the programs, explore whether the number of general interest courses could be reduced to allow staff to focus on professional development courses.

#### Continuing Education Response:

All programs, including Liberal Arts and Personal interest programs are evaluated and required to be self-sustaining financially overtime. Continuing Education acknowledges that these courses and programs generally deliver lower margins than professional continuing education programs and Program Managers leading these programs do have lower financial targets. However, aligned with our Community Engagement mission, and how we choose to translate that mission into action, Liberal Arts and personal interest courses are considered a core component of Continuing Education's value to the Calgary community.

### **Area of Recommendations: Facilities and Infrastructure**

#### Reviewers Recommendation 1:

Determine the program portfolio strategy (including online delivery) before embarking on significant commitments to real estate.

#### Continuing Education Response:

Continuing Education has reviewed our program portfolios and strategically determined there are two additional portfolios that we believe we should pursue. Both require more teaching space, not less. As stated earlier, these are: (1) the development of an access oriented portfolio, to support the pathway and bridging needed by a variety of marginalized groups and (2) a desire to recruit international participants to our non-credit professional development programs.

Consistent with what UCCE has put forward for numerous years, Continuing Education needs additional learning facilities to support the significant instruction activities offered by the unit. In late 2016, the strategic context and detailed needs assessment for a Continuing Education space was articulated in a “*Major Accommodation Request*” proposal submitted to the Deputy Provost and VP Faculties.

#### Reviewers Recommendation 2:

*“As part of the shift to proactively seeking and retaining clients, invest in CRM practices and in short order bring in CRM technology to support this part of the process.”*

#### Continuing Education Response:

Until recently UCCE had a subscription to Salesforce, a Customer Relationship Management (CRM) tool that was implemented in UCCE 3 years ago, however rarely used. In alignment with a collaborative approach to the corporate training market, Continuing Education and Haskayne School of Business have recently agreed to share a CRM database. Specifically, UCCE will implement Maximizer during 2017-18.

### **Area of Recommendations: Internal Partnerships**

#### Reviewers Recommendation 1:

*“CE’s infrastructure and resources should be the base for non-credit programming for the U of C providing value and service to other units and reducing the requirements for duplication and distribution of such services and infrastructure across campus. Destiny One could be an enterprise wide application.”*

#### Continuing Education Response:

UCCE and the CIO’s office have partnered to evaluate and recommend an enterprise-wide registration system solution for non-credit learning activities. An RFP has been completed and additional information will be forthcoming in the near future.

#### Reviewers Recommendation 2:

*“The Director needs to continue to pursue collaboration opportunities with those who see value in what CE has to offer. Seeking out those who are interested in addressing the needs of their audiences in non-traditional ways, affords opportunity for CE to build value.”*

#### Continuing Education Response:

Agreed, there is value in continuing to pursue collaboration opportunities with faculties and other units. The Director and other members of the Continuing Education team will continue to do so.

### **Area of Recommendations: External Partnerships**

#### Reviewers Recommendation 1:

*“Establish a partnership framework that allows for innovation, flexibility and a return on investment but also helps to further establish and build on new and existing relationships and increases reach beyond Calgary.”*

#### Continuing Education Response:

UCCE agrees that there is value in establishing a partnership framework and has been pursuing a variety of new partnership structures, intended to increase our innovation, flexibility and return on investment. Further, the newly designed role of Program Development Specialist (to research new programming ideas and partnerships) has recently been filled.

### **Concluding Remarks**

During the past decade, UCCE has developed a base of strong non-credit programming along with dedicated and knowledgeable staff and secured reserve funding from years of profitable programs and services to a strong local economy. The downturn in Alberta’s primary economic engine has affected the enrolment numbers and annual revenues at UCCE; a similar reduction in revenues has been reported by other continuing education units in the province.

Changes of this magnitude provide an opportunity for the unit to analyze its current operations and plan strategically for the future. The recently established program review process and proposed changes to the unit’s organizational structure will assist with ensuring thoughtful yet “quick to market” programming.

In order to meet the changes in market demand and capacity, UCCE may consider specific actions outlined in our recommendations such as reorganizing current certificate programs that exceed 100 instructional hours; establishing new kinds of partnerships and collaborations and leveraging the success of English Language Programs.

Based on our conversations and observations, the Review Team believes that there is an important role for U of C’s Senior Administration to play in clarifying the mission and mandate of UCCE and in helping to position the unit and its Director to carry out that mandate with greater integration with the larger University community and broader University goals.

## Follow-up

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The Review Team recommendations will be revisited mid-way through the cycle. At that point, Continuing Education will be required to report on its status in acting on the recommendations, providing explanations and timelines for those which have not been met. This interim report should be submitted to the Provost in September 2019, with the next full review scheduled in 2021-2022.