



COLLEGES
ONTARIO

The realities of June 7:
Where we are and where we are going

Presentation to the OCASA conference
June, 2018

What will the coming year look like?

- Many financial pressures in public sector organizations – our own and the added need to find savings
- New provincial government with a large majority and a decimated Liberal party that needs to rebuild
- A new Minister and possibly new Deputy
- A legislature in Ontario with 73 brand new members – 14 college grads; civil service unfamiliar with transition; a new premier with no legislative experience
- Uncertainty at home, in the USA and the world – potential to divert attention in Ontario from other files (eg. NAFTA)

Who would have predicted...



- Donald Trump
 - NAFTA & other trade wars
 - Fight with Canada and Trudeau
 - Potential lessening of N. Korea tensions
 - Student gun protestors gaining legislative traction
- Russian intervention in U.S. elections
- Brexit
- Syrian refugee crisis effect on the world
- A man in a van running down pedestrians in Toronto
- The MeToo/Times Up movement
- Finding a serial killer after over 30 years because of an ancestry site
- Doug Ford as Ontario's premier – meeting with auto sector before swearing in

Consequences of ongoing global uncertainty – Less ability to focus at home & getting worse



Where does the government go from here?



The new Leader: Doug Ford

- **Not from the conservative establishment**
- **Not tied to any current or past Tory election platforms**
- **Election platform was thin, so no real sense of priorities beyond the few identified**
- **Populist, but shored up his vote at the end with red Tories like Christine Elliot**

What do we know? Doug Ford's major commitments: save \$ and spend \$

- Find \$6 billion in “efficiencies” – starting with a value for money audit
- Fix the Hydro “mess”, including firing the CEO
- End Cap and Trade & take 10 cents off gas at the pumps
- Bring in “buck a beer”
- End “hallway medicine” by investing in long term care beds
- **Improve the apprenticeship system**
- **Fix the skills gap**
- **Invest in mental health**
- Help ordinary Ontarians with high costs (like hydro bills)
- “Ontario is open for business”
 - Tax cuts
 - Incentives to business
 - Cutting “red tape”
 - Large infrastructure investments

What is the new government likely to end?

“Care over Cuts” programs that includes many NDP issues – targeting millennials may go:

- Pharmacare for young people
- Money for environmental initiatives
- Bill 148
 - Minimum wage will not move to \$15 quickly
 - Equal pay for equal work? – Businesses do not like this
- Plus, everything in the Liberal budget, including:
 - \$12 million more for college equipment over next 3 yrs
 - \$170 million extra for apprenticeship over 3 yrs
 - Increase of \$60 million to yearly deferred maintenance fund by 2022
 - \$100 million evergreen loan fund for college cap & trade initiatives

But with some liberally minded conservatives in Cabinet, and millennial voters starting to show up, nothing is certain

What happens to this expensive commitment?



Net Free Tuition

Civil service already looking
at consequences of lowering
the income level

What else may come under scrutiny in pse?

Money for:

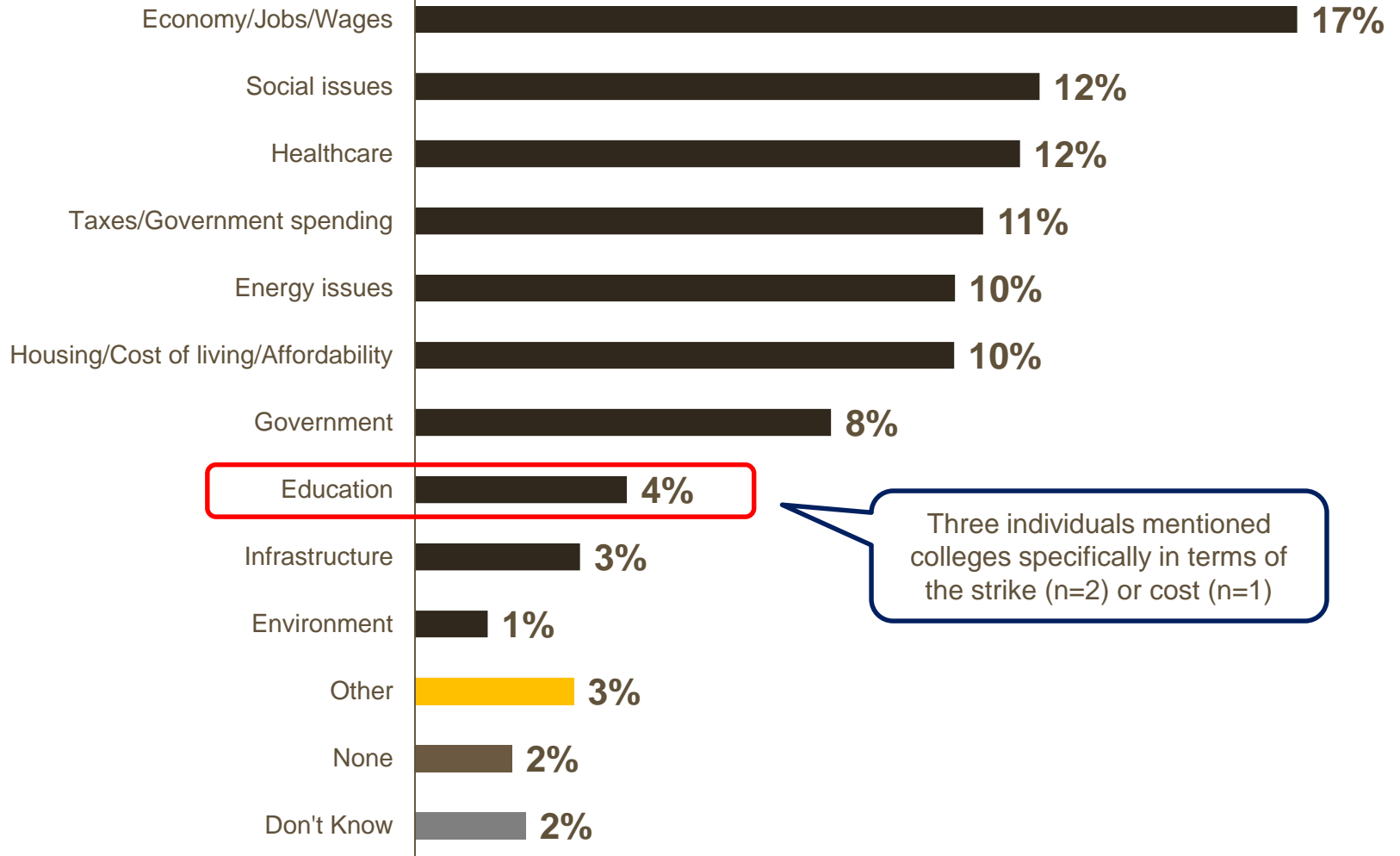
- Work integrated learning – or maybe more \$ for businesses to invest in training
- New campuses in Brampton, North Toronto
 - NDP won 3 seats in Brampton, Tories won 2
 - NDP, Liberals won most, but not all, Toronto seats
- Indigenous Institutes
- Francophone university

Top of Mind Issues: Economy/jobs/wages top the most important issues, followed by a social issues and healthcare



What is the most important issue in Ontario today, in other words, the one that concerns you personally the most? Please be specific.


[asked of all respondents; OPEN ENDED n=600]



Three individuals mentioned colleges specifically in terms of the strike (n=2) or cost (n=1)

How can colleges respond?

- Used election messaging around the value of colleges for jobs in the new economy, importance of STEM grads from colleges, impact of colleges on the economy & fiscal challenges – many colleges responded with op-eds, tweets, interviews
- Make sure all colleges are speaking with one voice about challenges and opportunities so a new government isn't bombarded with divergent message from one sector ...**COP has agreed on: Autonomy, sustainability, apprenticeship & credential reform – ways colleges help ensure Ontario is “open for business”**
- Prepare for what we need to push early in mandate:
 - New pre-budget submission to be ready for summer
 - Identify “red tape” in colleges that matters
 - Determine where Exec Comp fits, possible hiring/pay freeze?
 - Identify market opportunities as opposed to government \$
 - PCC's are liked by the Tories – partnerships may be back
 - Tuition policy could change
 - International activities may get a green light to advance faster
 - Apprenticeship reform could be on the agenda



Ontario's Colleges: Strengths with the public

Key Findings: *Perceptions of Colleges*

1.

People reject some of the negative myths about colleges:

- That college diplomas only lead to jobs in skilled trades (only 35% agree).
- That people with a college education are limited in their career opportunities (31% agree)
- That colleges are mostly for students who couldn't get into university (21% agree)

2.

Universities have a slight advantage over colleges in how they are perceived

- University graduates are deemed more valuable to employers (42%)
- Most agree that university grads have more opportunities for career advancement (53% agree)
- Just over half feel university grads earn more than college grads (51% agree)

3.

But in some ways, colleges are perceived the same or better than universities

- College education provides more career opportunities than a general arts degree from uni (58% agree)
- Over half feel a college education is just as good as a university education (51% agree)
- As many would hire a college grad over a uni grad (24%) as would opt for a uni grad (25%)

4.

Colleges have more in common with universities than with hospitals

- In terms of complexity, colleges are viewed as being more similar to universities than medium-sized businesses or hospitals.
- When it comes to compensation, respondents are much more likely to sign off on the salary of a hospital executive than a university or college executive.

5.

Respondents want government to fully fund their increasing demands on colleges

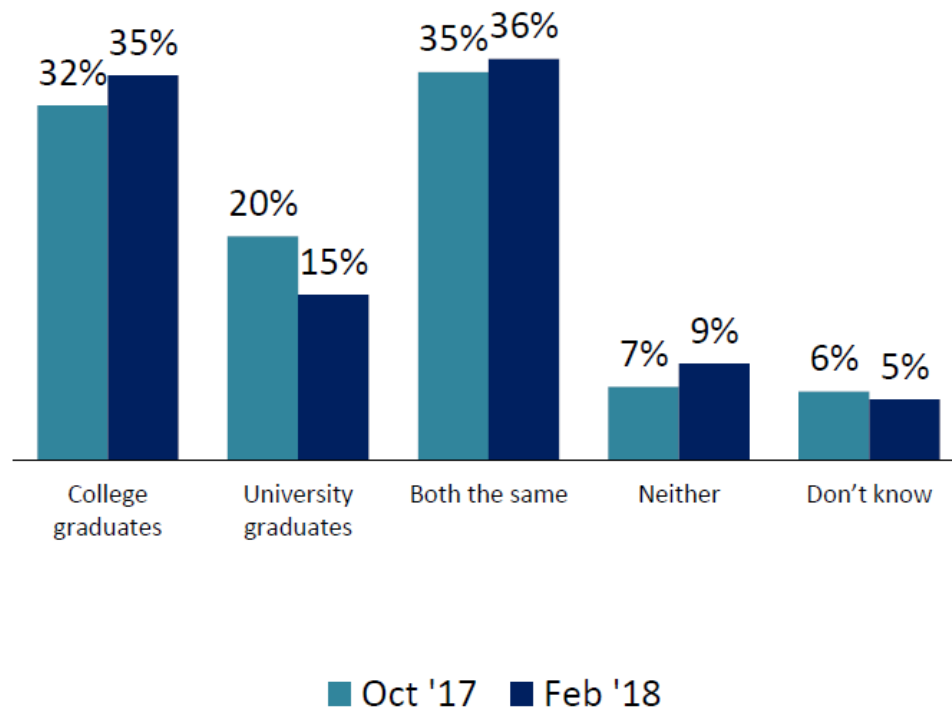
- Three-quarters feel the government should fully (41%) or partially (35%) fund their increasing demands on the college system.
- The more familiar a respondent is with the increasing demands, the more likely they are to favour full government funding.

Employment Preparedness: Over a third (35%) say college grads better prepared for employment; 36% say same



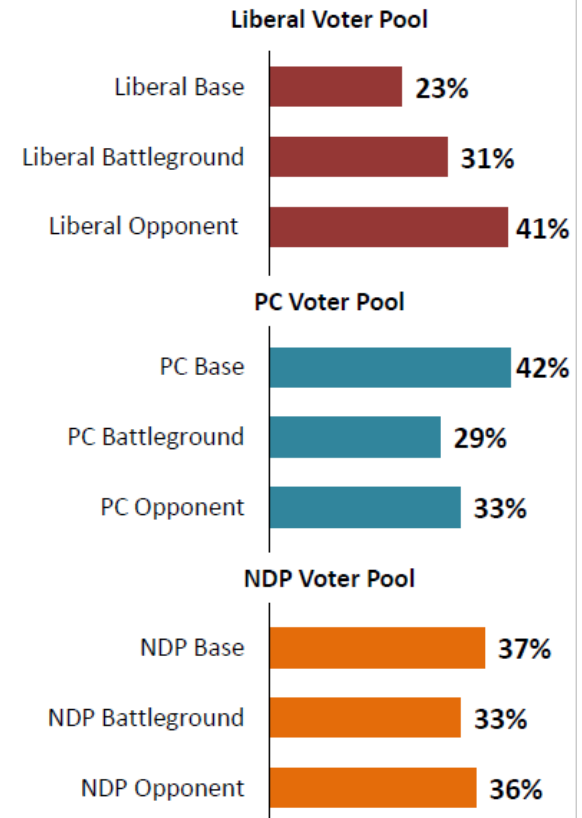
Who would you say is better prepared for employment upon graduation?

[asked of all respondents; n=600]



Segmentation

Those who say "College graduates"

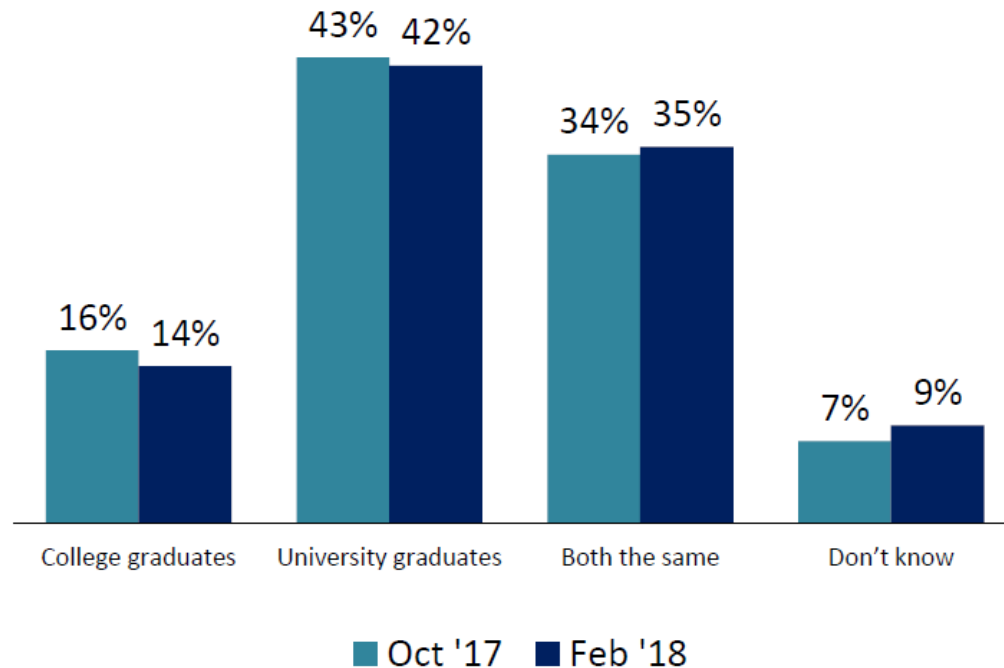


Value: 4-in-10 (42%) think employers value university grads over college grads, a third (35%) think both the same



What level of post-secondary education do you think is most valued by employers?

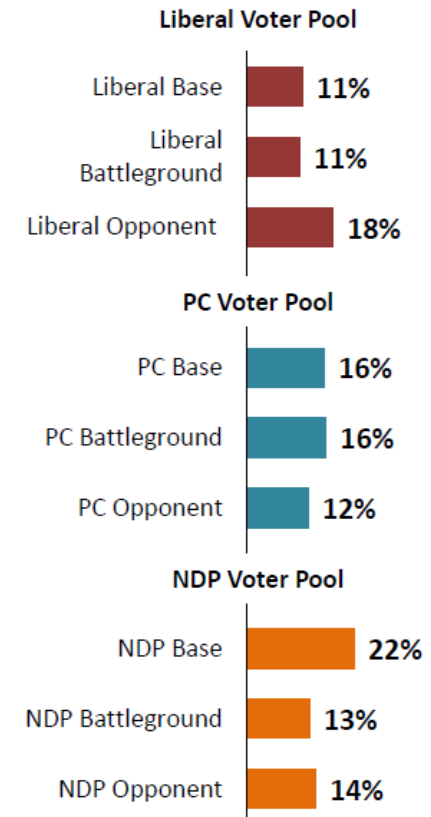
[asked of all respondents; n=600]



Note: For tracking purpose, the results of Oct '17 have been re-calculated to exclude the "neither" option (selected by 3%) which was not offered in Feb '18.

Segmentation

Those who say "College graduates"



Preparedness and Value: Those who think college grads are better prepared for employment are split most valued



What level of post-secondary education do you think is most valued by employers?

BY

Who would you say is better prepared for employment upon graduation?

[asked of all respondents; n=600]

Better prepared for employment

	College Graduates	University Graduates	Both the Same
College Graduates	31%	7%	5%
University Graduates	33%	83%	37%
Both the Same	30%	9%	51%

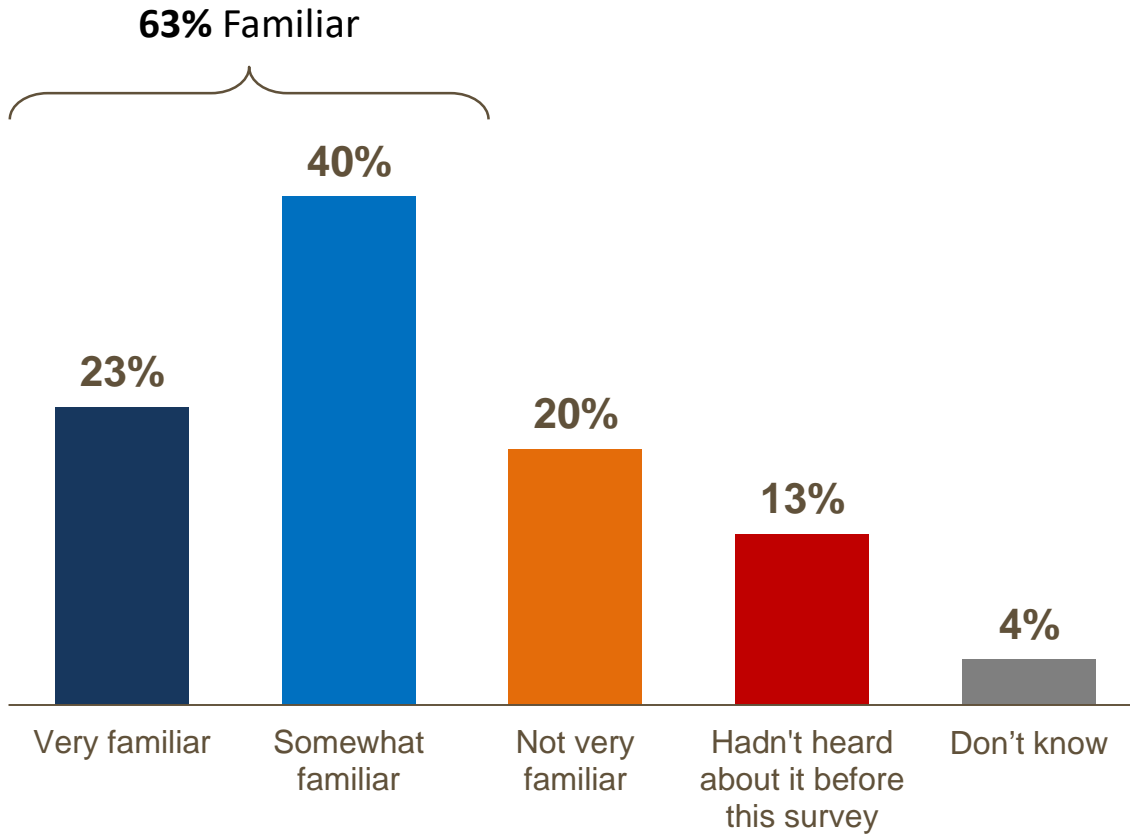
Valued by employers

Note: 'Neither' and 'Don't know' not shown due to insufficient sample size.

Familiarity with Colleges: 63% say they are familiar with their local college; higher among 18-34, NDP and those who've attended college



And how familiar are you with this college?
[asked of all respondents; n=600]



Segmentation

Those who say "familiar"

Liberal Voter Pool



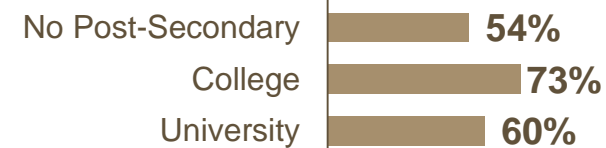
Decided Vote



Engagement with College



Education Level



Age

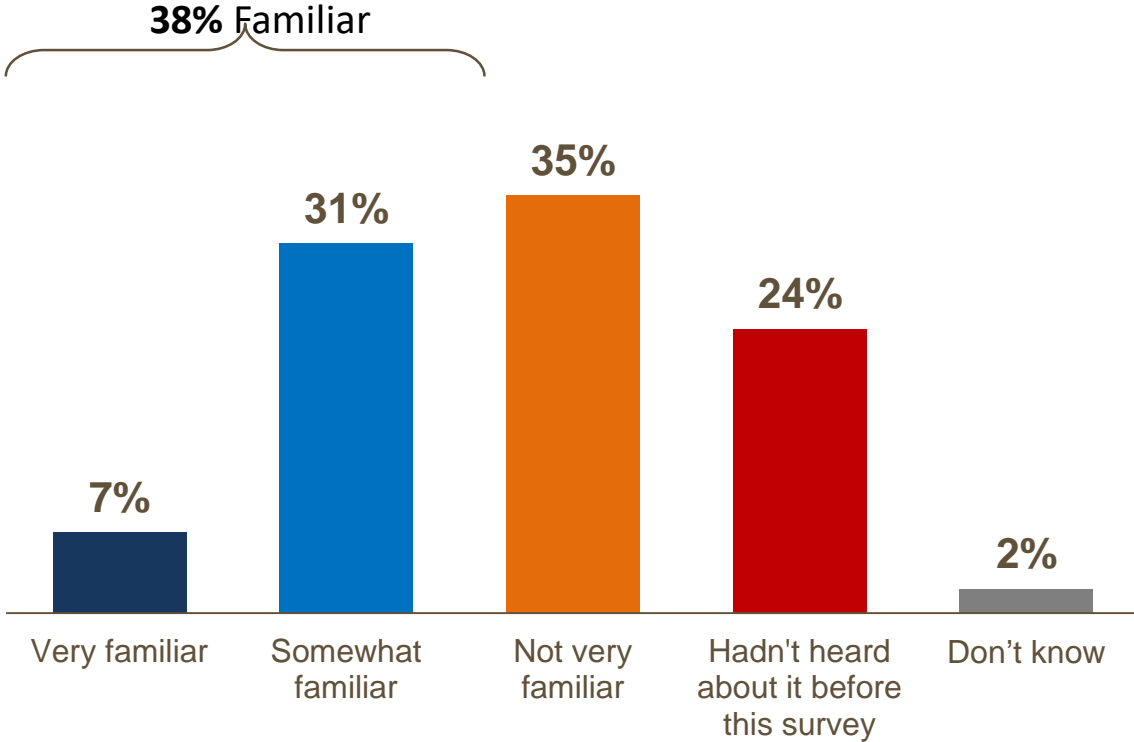


Funding: Four-in-ten (38%) familiar with increasing demands on college budgets; higher among 18-34 year olds and NDP voters



The government is making new demands on college budgets with policies such as higher minimum wages and pay equity, new services such as expanded mental health support for students, and new education mandates. How familiar were you with these new demands before this survey?

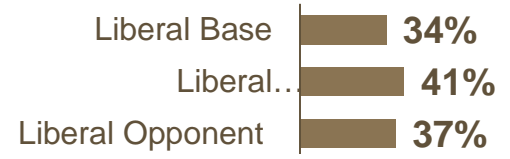
[asked of all respondents; n=600]



Segmentation

Those who say "familiar"

Liberal Voter Pool



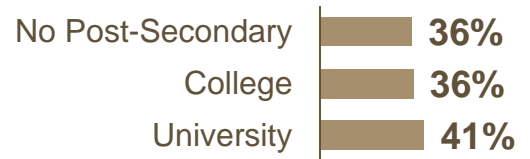
Decided Vote



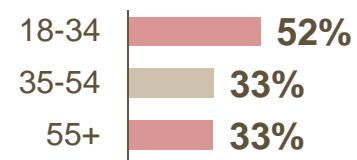
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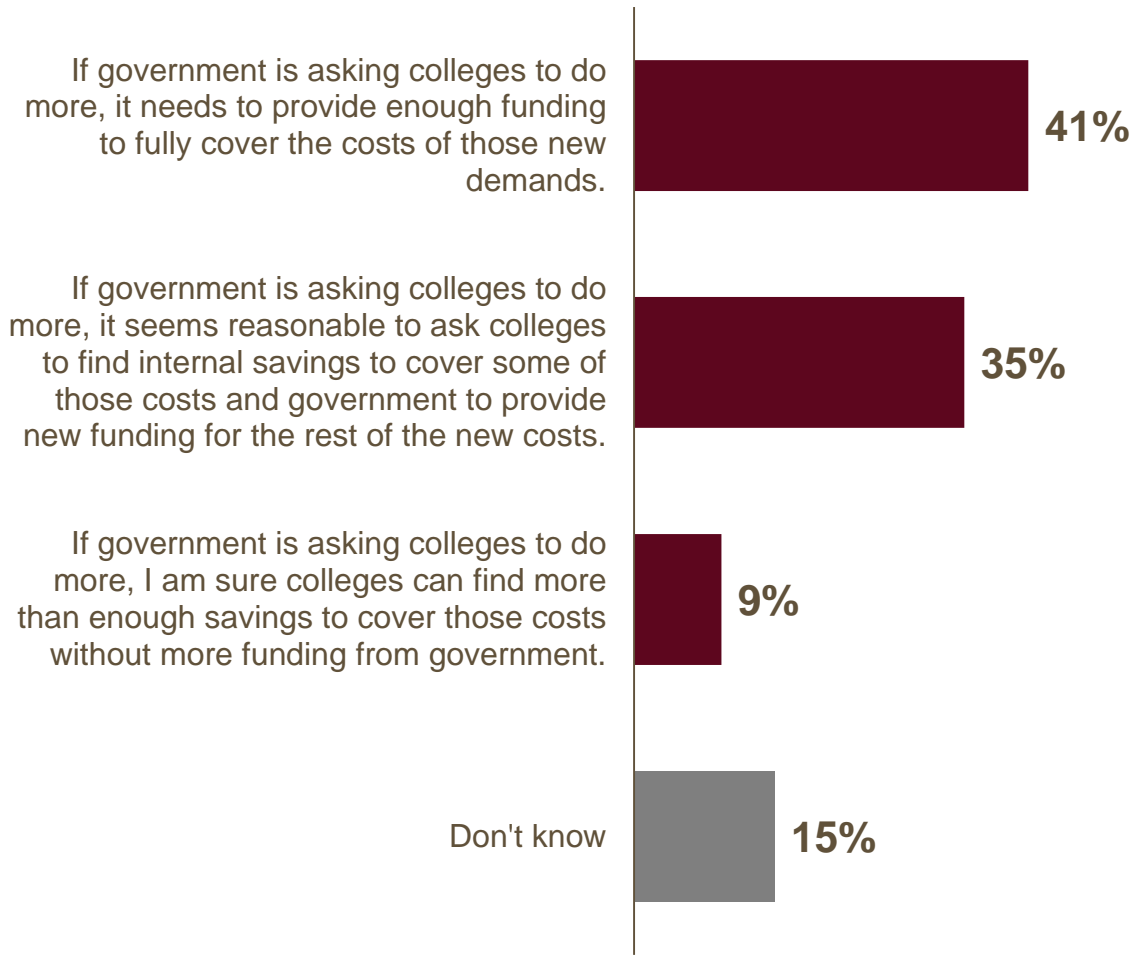


Source of Funding: A plurality feel government should provide the funding to meet increase demands



Which of the following points of view is closest to your own?

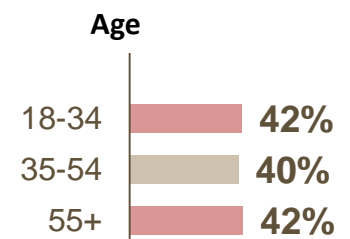
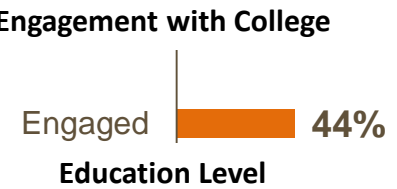
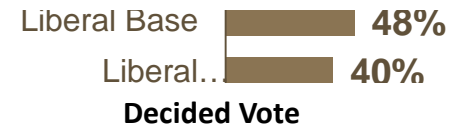
[asked of all respondents; n=600]



Segmentation

Those who say

"Gov't should fully cover costs"



In the mean time....

- What else is the college system working on and thinking about in the aftermath of the election and beyond?

What significant changes are we seeing?

Disruptors in Post-Secondary Education



Changing demographics



New delivery & provider options



Information & technology revolutions



Changing workplaces



New post-secondary education consumers

How will colleges be structured in the future to address these disruptors?

- Hybrid institutions? Polytechnics married to community colleges? No appreciable change?
- Different approach to credentials – new ways to reach mid-career students? Badging, micro-credentials?
- More specialization, driven by funding, SMAs
- More outcome based funding to demonstrate public success
- Even more experiential learning – how do we define this?
- Much more online content with many more providers
- Colleges within companies? More integration?

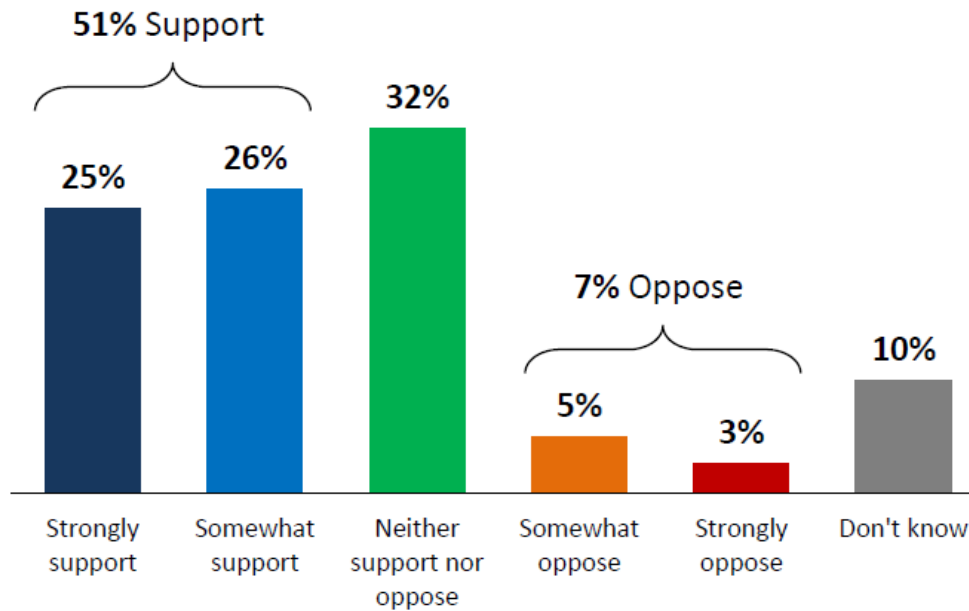


Support for 3-year Degree: Half (51%) support; Liberal Battleground most supportive while Base is least supportive



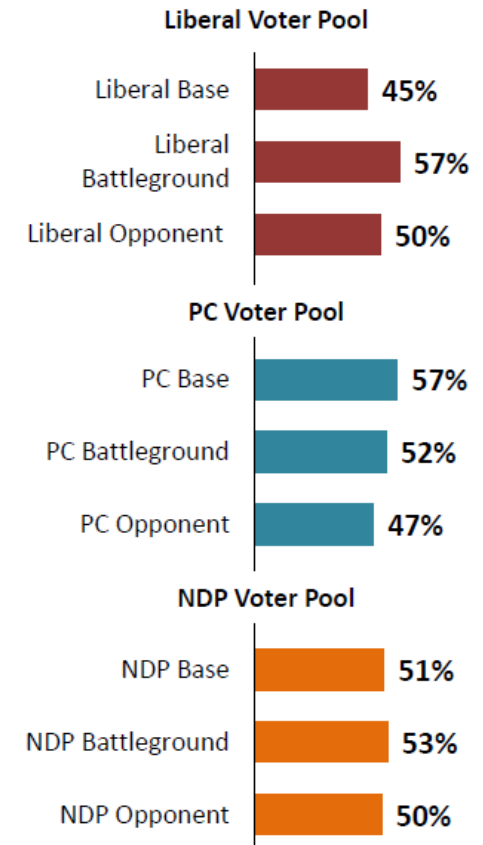
Do you support or oppose allowing Ontario colleges to offer three-year degrees?

[asked of all respondents; n=600]



Segmentation

Those who say "support"

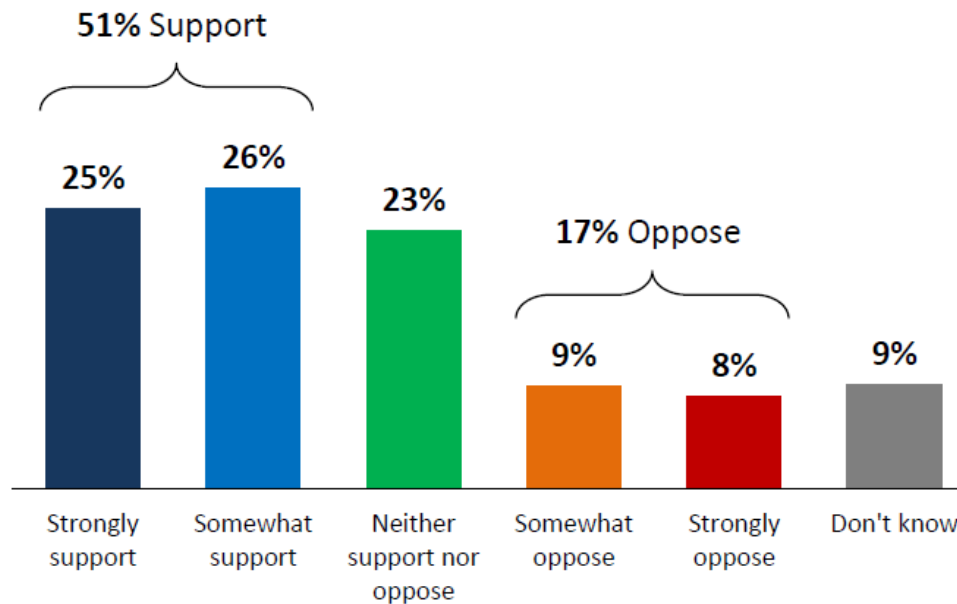


Support for Master's Degrees: Half (51%) support, again Liberal Battleground most supportive, Base least so



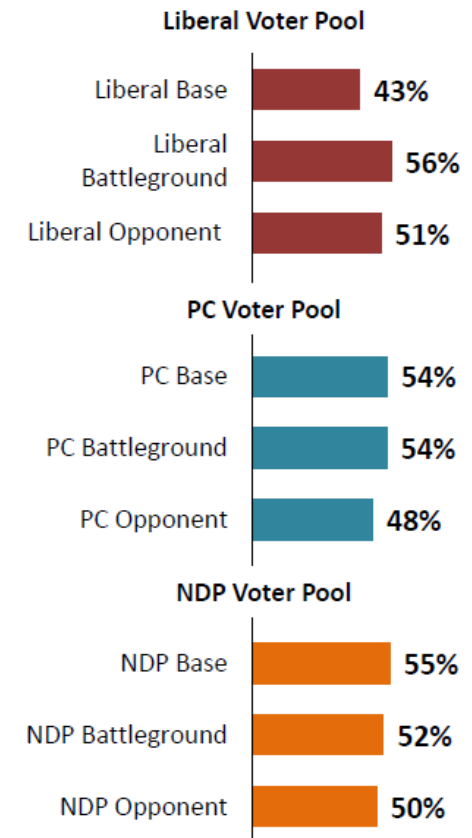
Do you support or oppose allowing Ontario colleges to offer master's degrees for specialized fields?

[asked of all respondents; n=600]



Segmentation

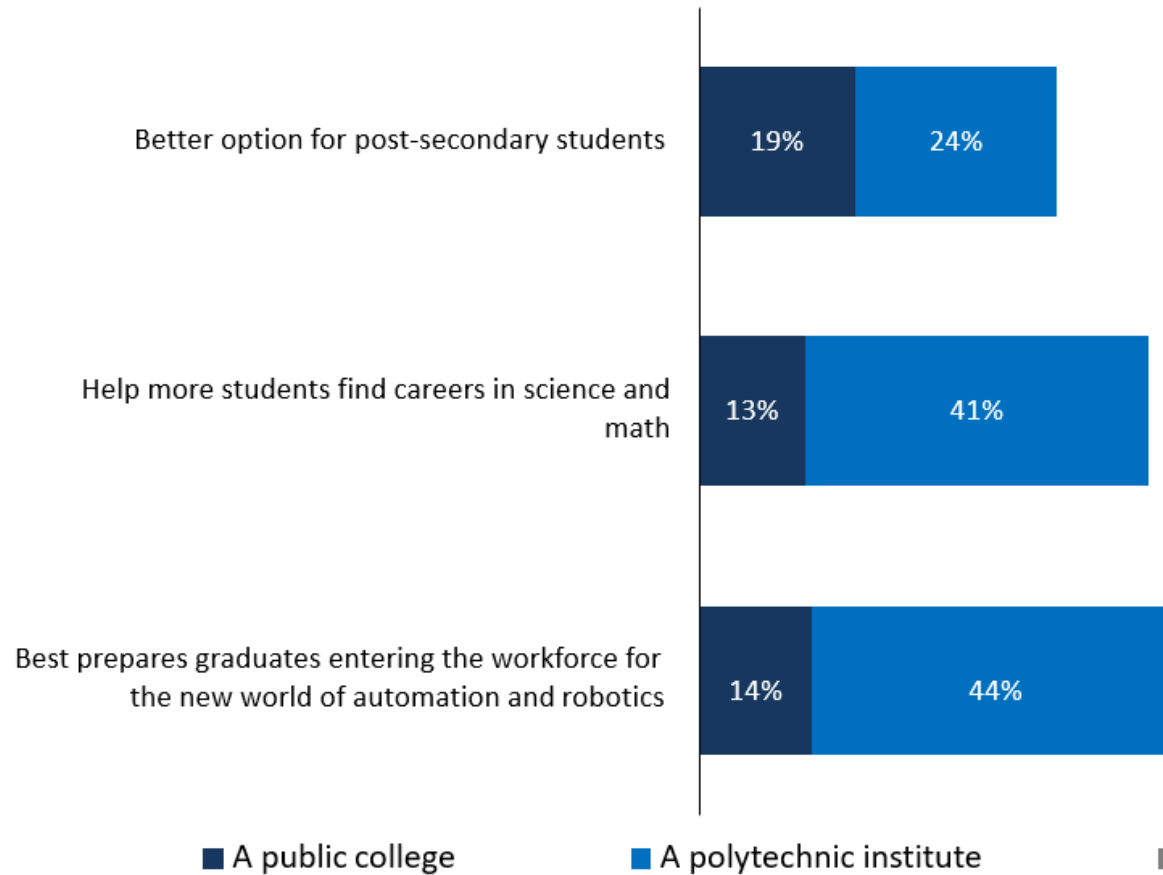
Those who say "support"



Better Option: Respondents feel polytechnic institutes are better than public colleges, but at least 4-in-10 don't know



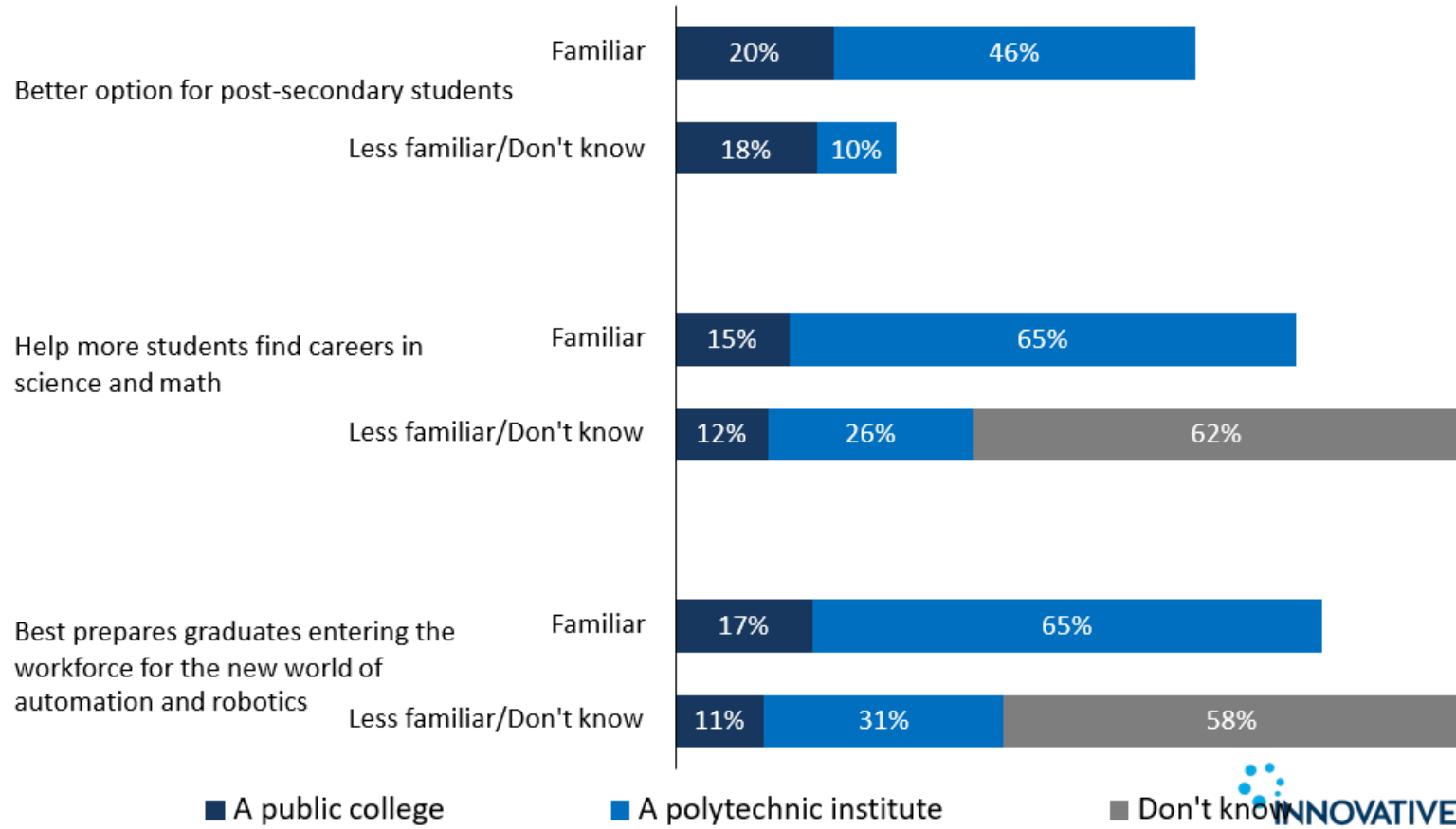
Which would you say is a /Which option do you think ...?
[asked of all respondents; n=600]



Better Option by Familiarity: Those who are familiar with polytechnics are far more likely to say they are better



Which would you say is a /Which option do you think ...?
[asked of all respondents; n=600]



Some thinking from recent consultations

- Colleges Ontario is starting to develop its next strategic plan



- Here is a sample of what employers and students tell us they are thinking about

What are employers saying?



- Work to raise the image of the trades with us
- Help us tell a compelling story to attract people to our respective industries
- Always look to add new technology to the classroom so students graduate as prepared as possible
- Look beyond industry advisory committees to a new level of engagement with employers; research centres at colleges are easier to work with than PACs
- Be leaders in workforce development research: identify changing workforce needs and help us plan to address them
 - Increase the profile of college services to the modern community
 - Respond even faster to market changes
 - Improve clarity about the system's brand & differentiation from universities

What skills do they want from grads?



Technical:

Knowledge and skills in artificial intelligence
Data and analytics – “data is the new gold”
Operations people with coding skills
Platform specialists & programmers

Soft skills:

critical thinking
communication skills
cross-disciplinary skills

General skills to support career success:

Because of temporary jobs: education/ training in business, entrepreneurship,
legal obligations of employers, HR management, taxes

Project management courses including for trades programs

Some breadth courses could be replaced by specific training like: negotiations,
marketing, conflict resolution, economics etc.

What are we hearing from students?



- Expose us to different career options
- Help us fit in well in the workplace
- Help us explain what we know to employers
- Offer more cross disciplinary options

As we tackle these issues, what holds our system together?

- Determined focus: Colleges understand the importance of their mission to students, community and the economy
- Colleges are respectful of one another and recognize each others' challenges
- The system works well together at all levels – committee structure is unique and supports all
- Lack of overarching ego – the system is prepared to share, learn and grow from each others' successes – are not isolated entities
- Structure of colleges allows for sharing – curriculum, on-line, pension plan, services etc etc

What challenges system solidarity?

- Emerging, different ambitions & visions
- Tension created by maintaining a “system” approach
- “Two Ontarios” – colleges are microcosm of larger challenge
 - Differences in realities, including:
 - Enrolment prospects
 - Ability to attract international students
 - Access to donors, applied research funds, other sources of revenue
 - Capacity to attract competitive funding – eg ghg \$
 - Ability to hire and retain great staff in world where millennials like urban environments
- Sustainability concerns drive different decision-making

What may be our main challenge with this government?



What is the ongoing agenda identified for CO?

- Sustainability (incl. Bill 148, SNR & mid sized college challenges)
- Understanding and working with government priorities after the election, improving relationships
- Apprenticeship reform
- Mental health support for students & colleges
- Truth and Reconciliation reporting, indigenous institutes
- Technology – how do we afford to be current in our classrooms?
- System design questions
- Tuition framework changes
- SMA3 – if SMAs stay, making sure colleges are engaged in this critical work & objectives are clearly defined and support our students & our ambitions
- Continued work to define & market value proposition of colleges

- Respecting individual institutions' ambitions while working to maintain a strong system voice

How will we measure success this year?

While a new government settles in (for months), for CO, the coming year is a time for positioning colleges for success in a new government mandate by:

- Creating a good working relationship with the incoming government
- Establishing at COP a clear focus on the few key issues we need to pursue – including direction on system design
- Engaging with the civil service to define shared objectives, incl. sustainability
- Finding and pursuing early wins based on government priorities:
 - apprenticeship reform, more autonomy, mental health

And trying to help government avoid this...

