

## **Analysis of the Environment:**

### Considerations for Strategic Planning

#### **Introduction and Context:**

This document is generally an update of aspects of the 2008 *Environmental Scan* conducted in the context of the Academic Planning Exercise that was undertaken at that time. The present planning approach is outlined on the president's web pages.

Since the preparation of the Academic Plan in 2008, several major changes have been experienced in the post-secondary environment in British Columbia, and several major developments have occurred in the economy and society that are worthy of note and consideration. These provide an updated context for the analysis of the environmental scan prepared at that time. While several contextual factors are noted below, these are by no means the only factors that should be considered in our planning process but are rather indicative of the changes and considerations people should be aware of as we engage in strategic planning.

#### **Context: The Creation of Five New Universities**

In 2008, five former colleges or university-colleges in BC were transformed into special purpose (teaching) universities. Four of these are within relatively easy commuting distance from Douglas College (i.e. within 60 minutes driving). They are:

- Capilano University
- Kwantlen Polytechnic University
- University of the Fraser Valley
- Emily Carr University of Art & Design

The declaration of these institutions as “universities” did not, however, come with new funding and the fact remains that Douglas College has more degree programs in collaboration or alone than many of the new universities as follows:

Degree Programs Offered at Lower Mainland Public Institutions of BC  
(excepting SFU and UBC) as of December 14, 2009

<b>Institution</b>	<b>Own Degrees Offered</b>
Douglas	6
Capilano	4
Emily Carr	4 (2 Master)
Kwantlen	14
UFV	4 (1 Master)
Langara	3
VCC	3

Source: Data from DQAB as of December 15, 2009

This being the case, given the specialized nature of most of the degrees being offered, the reality is that the degrees being offered in Lower Mainland BC by the non-research universities are not **yet** fundamentally competitive with each other, nor with the general University Transfer courses and programs being offered at Douglas College. There are two notable exceptions here:

- a) Kwantlen has a generalized Arts degree capacity and exempt status from the DQAB process and is, therefore, likely to be in competition with ALL UT programs in the Lower Mainland.
- b) Nursing degrees are now offered at most colleges and special purpose universities.

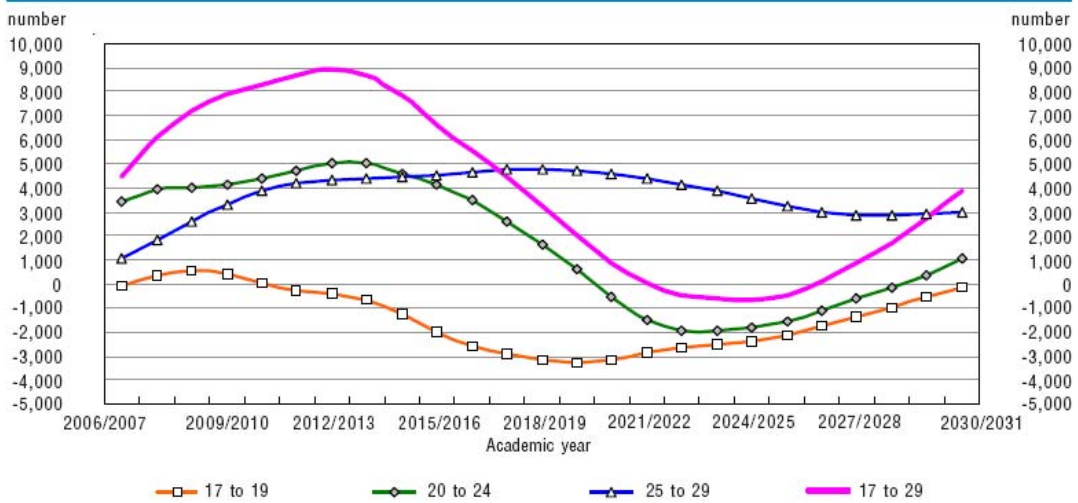
The bottom line to this is that on the University Transfer front (about 60% of Douglas College enrolments), the post-secondary environment has recently become much more competitive. Douglas College must respond in a meaningful way to this or risk losing “market share” to other institutions. Further, there is evidence that the Douglas College market share is diminishing as is addressed below.

**Context: Demographics**

Much has been written about the declining school-age population across Canada and in BC. A Statistics Canada report based on assumptions of constant post-secondary participation rates suggests that 9546 fewer students will be in post-secondary in BC in 2024 than in 2012. Particular to the Douglas College “region” which is discussed at length below, the 2006 census data suggests that we are not immune from this trend of a declining population in the K-12 system.

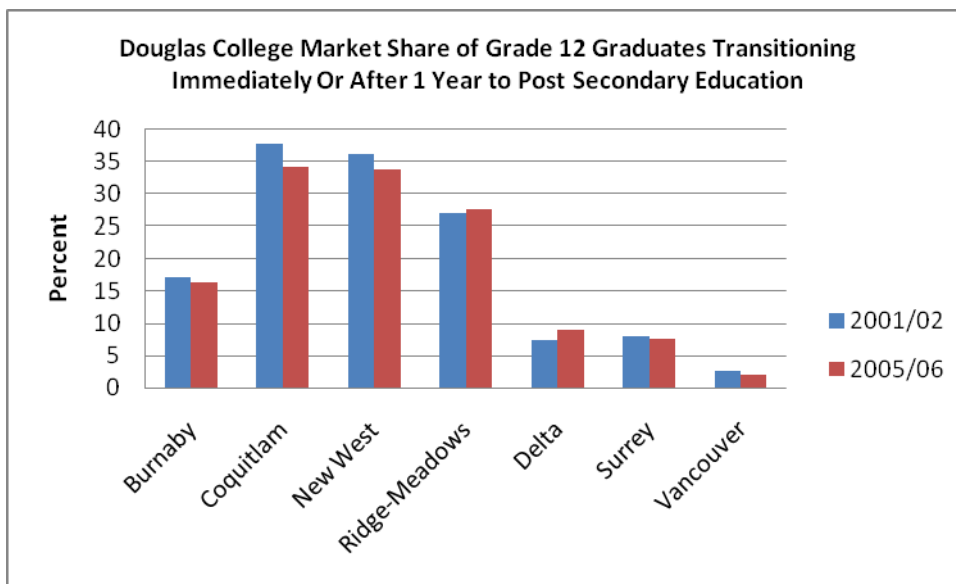
In particular, the ratio of grade 1 population to grade 12 population in British Columbia is 68%. Put differently, there are 32% fewer students in grade 1 than in grade 12. At constant participation rates, Douglas College will need an increasingly large market share to maintain constant enrolment. However, recent data from the School Districts suggests that the Douglas College market share of post-secondary bound students is declining. In Coquitlam, for example, between 2001/02 and 2005/06, the Douglas College market share of grade 12 graduates dropped from 38% to 34%.

**Difference in full-time postsecondary enrolment<sup>1</sup> between the 2003/2004-to-2005/2006 average and the projected enrolment: British Columbia, 2006/2007 to 2030/2031**

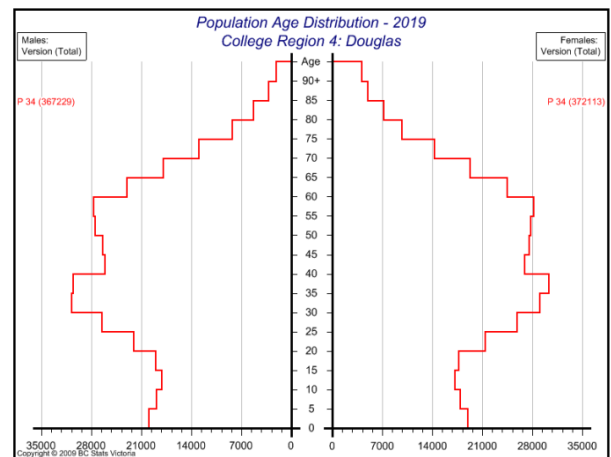
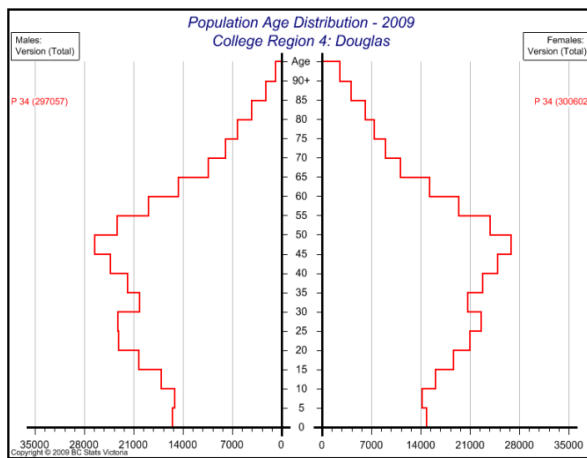


1. Enrolment difference is calculated by subtracting the 2003/2004-to-2005/2006 average enrolment from the projected enrolment.  
**Note:** The line at zero indicates no difference between the projected enrolment and the 2003/2004-to-2005/2006 average enrolment.

Source: Statistics Canada, Catalogue no. 81-595-MIE2007058, 2007



Nevertheless, Douglas College's market share<sup>1</sup> of students leaving grade 12 to pursue post-secondary either immediately or within one year is strong for the region served by Douglas College. It is, of course, anticipated that population increases will be quite robust in, for example, Coquitlam, Maple Ridge and other areas outside of Vancouver proper where land remains available for family-affordable housing. However, at present, the ratio of grade 1 to grade 12 students in the region served by Douglas College differs little from the provincial average. The BC population is aging. In terms of grade 12 students, even maintaining a constant market share in a diminishing market size means slow decline. Douglas College must either increase its market share or find new markets or both.

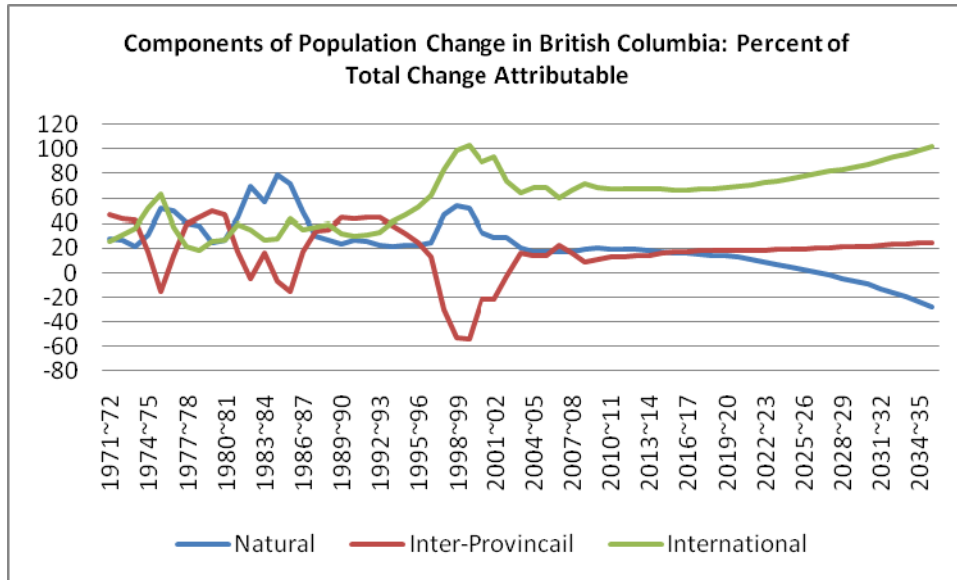


Source: BC Stats

Douglas College, of course, not only attracts those just from high school but also an increasing number of returning students. This represents a potential opportunity.

Coupled with these population projections is an understanding of the key role that immigration plays in British Columbia's population growth. In fact, at present, immigration from other countries accounts for approximately 68% of BC's population growth. 21% of population growth is from natural increases (births minus deaths) and 11% from inter-provincial migration. BC Stats projects that by 2027 the natural increase in population will be less than zero meaning that deaths exceed births in the general population. All growth will then be from immigration.

<sup>1</sup> Market share is a shorthand for the proportion of students who chose to attend Douglas College versus all other post-secondary and training institutions.



Source: BC Stats

**Context: Mobility**

The history of BC Colleges is that they were initially set up by school districts to serve particular geographic areas. Yet it is clear that the population is increasingly mobile via mass transit, automobile, or broadband. Further, it is clear that notwithstanding particular geographic regions, students are absolutely free to move between institutions and many do. For example, in 2006/07 13.6% (2319) of Douglas College’s 2005/06 students left Douglas College to study elsewhere. Of these, approximately 40% went to the universities and 60% to other colleges or institutes. Douglas College also experienced an inflow from other institutions of 1541 students in that year of which 26.5% were from universities and the remaining 73.5% from other institutions.

This being said, outflow exceeded inflow by approximately 800 students and an additional 5500 students left Douglas College in 2006/07 without a credential and did not re-enroll at any BC post-secondary institution in the subsequent year.

The point is then that Douglas College is clearly **both** a sending and receiving institution and that Douglas College’s retention of students should be addressed. While there is considerable work that has been done on retention, the context for retention needs to recognize student mobility.

## Updated 2008 Academic Plan Scan

### What do we know about students?

Who are our current students?

Age: Young (70% age 24 or younger)

Enrolment status: Part-time (65% taking three or fewer courses)

Sex: Female (64% female)

Multicultural: 48% had a childhood language other than, or in addition to, English

Local: 60% from north of the Fraser River, Burnaby to Maple Ridge.  
(One quarter of all students live in the TriCities)

Live in parental home: 60%

Less clear about goals and motivations than at some other institutions  
(See, for example, 2007 Applicants Survey)

Mobile: about 50% return to Douglas each year, 20% enroll elsewhere in the BC public postsecondary system, and 30% disappear. Of the 30% who disappear, graduation from Douglas accounts for only one fifth of the discontinuing students.

Enrolment patterns: considerable differences exist between open and limited enrolment programs. Also, variation exists in student characteristics across Faculties, e.g. older students are concentrated in Health, CFCS and Student Development.

Frequently not university eligible: about 15% of the recent high school graduates who have come to Douglas College had the grades and courses to go to university instead.

#### *Potential implications:*

- *Douglas College serves a student body that is “young” in many respects. We could seek to attract a different caliber of student or we could emphasize a transitional, developmental role as a distinctive niche. The situation varies significantly, however, across open and limited enrolment areas.*
- *With many students living at home and studying part-time, not all are financially constrained and short on time. Employment may be a lifestyle choice rather than a necessity.*
- *Douglas serves a student body that is 2/3 female. Many institutions north and south of the border have recognized similar patterns and have adjusted their recruiting patterns and marketing plans.*
- *What other possible implications do we need to consider?*

How have students changed in the past 5 to 10 years?

Demographically: not very much, e.g. part-time/full-time mix is similar to a decade ago and Douglas still serves mainly recent high school graduates. The proportion of females is slowly increasing (3 percentage points more than a decade ago.) In the early nineties, the big change was a rapid increase in the multicultural composition of the student body.

Qualitatively: Something seems to be happening with the twixters, NEETS, and boomerangers that is congruent with anecdotal reports from Douglas faculty. (See page C30 of the Environmental Scan for the 2006 Douglas College Strategic Plan for discussion of these terms.) Some of the changes are elaborated below.

*Potential implications:*

- *The significant changes seem to be attitudinal, e.g. students' sense of entitlement. Faculty's experiences as educators of these students need to be compiled to give a comprehensive picture of the changes. The College's attention to the scholarship of teaching and learning may be timely.*
- *What other possible implications do we need to consider?*

Who do we expect our students to be in the future?

Fewer recent high school leavers: demographic decline in province. (See pages C2 – C4 of the 2006 College Strategic Plan scan.)

Selective "consumers," with lots of institutional choice (especially those living in the large centres of Burnaby and north Surrey)

Continued high levels of immigration and under-prepared students

*Potential implications:*

- *In today's more competitive environment, Douglas needs to be persuasive and appear professional to its traditional high school clientele.*
- *Need to expand enrolment of older students if the College is to meet its enrolment targets. The foreign born population may be a good place to start.*
- *Keep in mind the large numbers of under-prepared students for whom Douglas College could be the institution of choice.*
- *What other possible implications do we need to consider?*

How are the needs and desires of our students changing (and what do we anticipate them to be in the future?)

Tech savvy, particularly with regard to communications media  
Sense of entitlement, consumer mentality  
Perhaps less convinced of the value of education, but receptive to good arguments.  
Career paths and routes into adult roles seem less obvious to today's teenagers.  
Choosy (especially prospective adult students who are looking for upgrading, career switches or personal development)

*Potential implications:*

- *High school grads are used to educational technology and often come from schools that were recently built or renovated. They expect similar or better quality and service from Douglas College.*
- *May need help with goal setting and educational planning, and with the developmental tasks of entering adulthood (including the task of meeting faculty expectations for study at the postsecondary level)*
- *What other possible implications do we need to consider?*

## **What resources does Douglas College have to offer students?**

### Programs

Academic emphasis. Like some other urban institutions (Langara and Capilano), Douglas has large Arts, Science and Business components. Applied programs often include university transferable courses.  
Large emphasis on Health Science and Human Service programs  
Trades programs are not offered at Douglas  
Few technology programs  
Most courses are delivered in standard face-to-face, semesterized, weekday and evening formats.  
Few short programs; trend towards longer credit programs.

*Potential implications:*

- *The advantages and disadvantages of offering more short, perhaps laddered, programs should be explored.*
- *Arts, Science and Business courses are widely available in the Lower Mainland. Need to consider how to make Douglas' offerings stand out in terms of secure transfer pathways with UBC and SFU without loss of credits.*
- *Careful planning of any additional Applied Degrees.*

- *Offer more programming in formats that allow students to work/have a life while attending college.*
- *What other possible implications do we need to consider?*

## Faculty

Well regarded by former students

(See Key Outcomes Indicators, BC College and Institute Student Outcomes survey of former students)

Retirement wave starting

Already difficulty recruiting in some disciplines

Being stretched thin, on top of which is a desire to foster scholarly activity.

*Potential implications:*

- *Expand data collection and professional development to further substantiate our claim that Douglas has excellent instructors*
- *Clear college priorities may help faculty with managing their scarce time.*
- *Review current support levels and mechanisms for research and scholarly activity given base budget restrictions*
- *Human resource planning needs to occur in tandem with academic planning*
- *What other possible implications do we need to consider?*

## Learning Outside the Classroom

A broad array of services and learning supports, but rates of usage are lackluster by North American standards (See Community College Survey of Student Engagement, 2007)

Commuter institution; little campus life, or even study and lounge space.

Exploring virtual communities, e.g. online tutoring and real time library services

Library generally gets rated more highly than at other colleges (e.g. CISO former student survey)

*Potential implications:*

- *The characteristics of commuter schools can be hard to change, but targeted attention to learning outside the classroom may enhance the student engagement the literature has shown to foster learning.*
- *What other possible implications do we need to consider?*

## Facilities

Adequate, but somewhat uneven

No residences.

Technology is improving.

Many offices remain overcrowded.

Shortages of general study space and no learning commons/centre.

Space shortages in a number of areas

*Potential implications:*

- *Budgets are tight, but seek ways of providing student space outside classrooms that is welcoming and which makes it easy for students to study individually or in groups on campus.*
- *Seek ways to provide learner resources in concentrated space.*
- *What other possible implications do we need to consider?*

### **To what other postsecondary institutions do we need to pay attention?**

#### Partners

Former Douglas students study most frequently at SFU, followed by BCIT, Kwantlen, UBC and the University of the Fraser Valley. (See Student Transitions Project, CISO former student survey, and BCCAT Transfer Profiles)

*Potential implications:*

- *Maintain strong relationships with SFU as it is the main destination of former Douglas students who continue their studies.*
- *Need to continue to pay attention to UBC*
- *There may be opportunities to develop partnerships with nearby BCIT, Kwantlen, Langara and VCC*
- *What other possible implications do we need to consider?*

#### Competitors

With declining high school cohorts and increased capacity, universities are aggressively recruiting in the high schools with considerable success. Fraser Valley and Kwantlen have university status.

Douglas has relatively few vocational offerings. Where it does, e.g. in the allied health or lower level information technology fields, the private sector is often the main competitor. Similarly, private ESL schools are numerous.

Developments at neighbouring institutions seem to be having large impacts on Douglas College, e.g. lowering of admission GPA at SFU and the migration of Maple Ridge students towards UCFV.

*Potential implications:*

- *Douglas' geographic location, coupled with the programming it offers and the type of student it has historically attracted, makes it vulnerable to changes at other institutions. Douglas needs to monitor developments elsewhere and be prepared to respond nimbly.*
- *Douglas needs to have its own plan and be proactive in terms of maintaining or increasing our market share.*
- *What other possible implications do we need to consider?*

Potential changes in the BC postsecondary landscape

Continued focus on meeting enrolment targets, with varying success depending on the type of institution, location and program mix.

Campus 2020 –some of the themes such as the need for more coordination and better information persist

Efforts to serve First Nations, including through Adult Basic Education

Impact of private institutions is still unclear, but it is a government priority

Lots of competition for degree-bound students

*Potential implications:*

- *Determining an intentional niche for Douglas College in the BC postsecondary landscape will be challenging but important.*
- *What other possible implications do we need to consider?*

**What are the characteristics of our local communities?**

Socio-Economic Characteristics

The formal Douglas region, Burnaby to Maple Ridge, is largely upper working class and middle class. Average income is close to the BC average.

Mainly suburban, with some urban and rural areas.

Transportation congestion seems to be an increasingly important consideration as residents make choices.

Over 20% of the adult population currently possess bachelor's degrees, compared to 10% in 1991

Significant ethno-cultural diversity and increasing immigration from other countries whose cultures place a high value on education but may not understand the role and mandate of colleges in the BC context.

Maple Ridge, Pitt Meadows, Port Coquitlam and Port Moody have the largest share of the population age 15 years and younger (about 20% in each of these communities)

Douglas also enrolls some students from North Surrey and North Delta. Some neighbourhoods in north Surrey have low incomes.

*Potential implications:*

- *The multicultural aspects of our communities are perhaps the key demographics that need to be considered in academic planning.*
- *Transportation barriers and competition from other institutions may make it difficult to recruit students from afar, except for unique and distinctive programs.*
- *Establish a greater presence in North Surrey.*
- *What other possible implications do we need to consider?*

### Demographic Forecasts

Grade 12 enrolment projection for the Douglas region is flat to diminishing. Losses due to small families and aging children will have to be offset by in-migration. Western portions of the Lower Mainland will see declines or no growth in Grade 12 enrolments. Grade 12 enrolments in the eastern regions of the Lower Mainland are growing modestly, with the largest absolute growth south of the Fraser River.

Provincially, the 18 – 24 population is expected to be flat for about a decade, then decline for decade before starting to recover. The Douglas region is forecast to show very modest growth.

The growth in the Douglas region will be 25 – 44 age group and especially in the 45 – 64 age group.

Growth will be dominated by immigration from other countries (over 2/3 of BC's population growth)

*Potential implications:*

- *Need to increase the proportion of students who are older, but this is not an easy task given the diversity of the adult population.*
- *Potential to internationalize Douglas College*
- *What other possible implications do we need to consider?*

### **How might changing economic conditions affect Douglas College?**

#### Occupational Forecasts

(Comprehensive, long term, good quality occupational forecasts are surprisingly few and far between. Most forecasts are either by economic sector rather than by occupation, are for specific occupations, or are short term.)

While the majority of all job openings will require some form of postsecondary education, only a minority will require a university education.

Retirement: Forthcoming wave of retirees will lead to a talent shortage rather than a general labour shortage, i.e. it will mainly affect certain industries and occupations.

US job growth is predicted to be largest in service and professional occupations. Many of the occupations with the fastest projected rates of growth are in the health and selected IT fields.

Shortages are emerging in the trades, but it is less clear the extent to which public institutions are able or need to fill the gap.

*Potential implications:*

- *In the absence of compelling evidence about overall occupational outlooks, it may be best to look for occupational niches and to use a pilot test/experimental approach.*
- *What other possible implications do we need to consider?*

## Economy

Anecdotal evidence and the conventional wisdom are that young people enter the labour market rather than go to school when the economy is strong, but few empirical studies are available to confirm this.

The BC economy experienced a serious recession in 2009 but there is some evidence of recovery. There is speculation that economy may do poorly after the Olympics in 2010.

*Potential implications:*

- *Enrolments may rebound for a few years, but we can't count on them. Demographic trends would not support this analysis.*
- *What other possible implications do we need to consider?*

## **What public policy issues are most pertinent to Douglas College?**

### Provincial

Attention to Health, Environmental, and First Nations issues.

Additional provincial funding is being put to uses other than college education, e.g. no inflationary grant this year.

Tension between centrally controlled decisions (e.g. tuition and salary increases) and market principles (e.g. enrolment competition)

Cost-recovery and for-profit education is viewed favourably by government.

Mandated Carbon Neutrality by 2010

*Potential implications:*

- *Build on Douglas' existing programming in the health sciences*
- *What other possible implications do we need to consider?*

## Federal

With the 2006 census showing 20% of the Canadian population is foreign born, the federal government's emphasis on helping foreign trained professionals enter their professions in Canada, and on Prior Learning Assessment and Recognition generally, is likely to continue.

Calls for a national postsecondary strategy, but nothing imminent.

ACCC lobbying for research funding for Colleges partly due to the need to find uses for College facilities when enrolment declines are experienced.

### *Potential implications:*

- *Develop fast track offerings for people with previous educational qualifications.*
- *What other possible implications do we need to consider?*