

**Report to the University of Alberta President and Provost
on the Peter Lougheed Leadership College
by Peter MacKinnon
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On November 2, 3 and 4, 2016 I was on site at the University of Alberta for interviews and discussions in support of my review of the Peter Lougheed Leadership College under terms of reference that required me to assess (1) The strengths, weaknesses, challenges and opportunities of PLLC; (2) the merits of the academic and co-curricular programming offered by PLLC and the audience for this programming; and (3) PLLC's sustainability in three key areas: leadership, governance and finances. I participated in 25 meetings involving 67 participants, and received telephone and email submissions from others.

I am grateful to all who met with me, or otherwise expressed their views. I must add my gratitude to Bobbi Schiestel of the president's office. She compiled background documents and information, coordinated an intensive interview schedule, and provided excellent support that made the most of my time on campus. I thank her warmly.

The terms of reference shall be addressed in order.

The strengths, weaknesses, challenges and opportunities of PLLC

Strengths

The interviews and supporting documents point to three strengths: a compelling vision with existing and potentially further alignment with the University of Alberta Strategic Plan for 2016-2021; considerable progress in implementing the vision, and a commitment and esprit de corps within the college that is palpable.

The original vision is that of John and the late Bunny Ferguson who, on the death of Peter Lougheed, sought to commemorate his legacy at their university. It rests on recognition that leadership is fundamentally important; that it can be learned, and that there is a discrete field of study and experience to support that learning. The Fergusons developed and carried their vision to public and private sector leadership in the university, province and beyond, and secured early and considerable financial support for its implementation. It finds contemporary expression in the college's vision to serve as "a thriving centre of excellence for leadership skills development where students are immersed in and benefit from leading-edge learning experiences."

The 2016-2021 University of Alberta Strategic Plan, For the Public Good, makes explicit reference to the objective of accessing "leadership development programs for undergraduate and graduate students, such as the Peter Lougheed Leadership College." In addition, there are countless references to leadership in the plan. These imply that there is an opportunity for the university to reflect on the role that the systematic and interdisciplinary study of leadership may play in the next stage of the university's evolution. As the university builds its portfolio of

signature areas, perhaps leadership will be included among them. In its objective to attract outstanding students in Alberta, across Canada, and beyond, a unique and distinguished capacity in leadership education and development might assist the university in recruiting the exceptional students it seeks to attract. Existing university capacity in French language instruction and scholarship (Campus Saint-Jean) suggests potential opportunities to recruit students from French speaking regions in Canada and abroad.

There has been considerable progress in translating the PLLC vision into reality. Complementary first year courses are in place, as are second year courses devoted to workshops and capstone projects. Co-curricular leadership projects and an ambitious instruction development model are evolving. And Peter Lougheed Hall, anticipated to be a residence and important college meeting and social centre will be open to students in September 2017.

The third strength is the evident commitment and esprit de corps within the college. The leadership is passionate about the program and potential; teaching fellows shared their passion; the mentorship program is developing as planned; and, it must be emphasized, students are enthusiastic about the quality of their experience. Within a short time, and despite inevitable growing pains, the Peter Lougheed Leadership College has inspired enthusiastic commitment among its members that is notable in an organization so young.

Weaknesses and Challenges

First and most important, the college has both a short term and long term sustainability problem. Financial commitments on a scale contemplated at its inception have not been confirmed. It was hoped that \$105 million, one-third from the provincial government matched by the federal government, with the remaining third from philanthropy, would be raised to support the initiative at each of the U of A and Banff Centre. This would have resulted in a pool of \$210 million which - if endowed - could have supported the initiative in perpetuity. The reality is that only the provincial commitment has been realized. A matching federal grant and philanthropic support at the level anticipated are not in sight. This means that the provincial grant is not part of a larger investment fund to support the College in perpetuity. Instead it is being spent to pay for operations and for the capital costs of the building.

What does this mean? First, provincial grant monies are being spent at a rate that could see them exhausted before the expiry of the current ten year commitment. Second, upon the expiry of the provincial grant, continuing operations are in jeopardy unless new sources of revenue are confirmed from within the university's operating budget or from external sources. Quite simply, as seen from 2016, the college is not sustainable.

Another challenge is the building that is expected to be its home: Peter Lougheed Hall. The university will take delivery of the completed building early in 2017 and will welcome residence students the following September. The dream here is of a residential college of which there are many examples worldwide. A notable Canadian example is Massey College at the University of Toronto.

Northrop Frye once observed that most of what we learn, we learn from one another. Peter Lougheed Hall is intended to be more than a place to live while studying down the street or across campus. It was intended to be an interdisciplinary, intellectual community of the college's students living in proximity to one another with opportunities for informal dialogue and programming to enhance their study. This intention may not be realized. Without substantial inducements, it is unlikely that the hall's 143 spaces - or even half that number - will be occupied by PLLC students. A premium will be added to normal residence fees to reflect the quality of the space and the anticipated enhanced experience. The students are in their third and fourth years, a time at which many students prefer to live off campus. And the Edmonton housing market has softened, for the foreseeable future at least, making off campus costs more favourable in comparison to those of living in residence.

A third weakness or challenge is what might be called a lack of equity in the college on the part of the wider University of Alberta community. The college was inspired by interests outside the university's normal academic channels. It was not integrated from its inception within these channels, and it has had an unsettled relationship with other parts of the university. There has been some softening of attitudes, in part attributable to the approval of the college's certificate program by General Faculties Council, and in part because there have been recent collaborative efforts. But there remains a residual skepticism about the role of the college in the university.

Opportunities

Leadership can be taught, and there are innumerable conferences, workshops, books and programs to that end. But in Canada there is only one university college committed to leadership skills development: PLLC. It is now an established fact, though it rests on a precarious foundation, and the question before the university is clear: after present commitments are met, will the college succumb to its sustainability issues, or is distinction in the study of leadership a goal to which the university aspires? Struggling along with an uncertain future is not an option at an institution of the stature and repute of the University of Alberta.

In the short term there are measures that might be taken to stabilize the college. First, a balanced budget in 2017-18 and subsequent years should be finalized. Second, the college could explore the potential for a more equitable sharing of expenditures on this partnership initiative between U of A and The Banff Centre. (the 3.5 million annual grant is being drawn down at PLLC with deficits, while The Banff Centre is accumulating annual surpluses). Third, the \$10,000 awards to students are no longer affordable. Phasing out of the \$2500 awards in each of years 1 and 2 is underway. The \$5,000 committed to the stretch experience awards could instead be a credit against fees at Peter Lougheed Hall; this would be an inducement to PLLC students to live there. Fourth, PLLC should explore revenue generating opportunities from lending its expertise in leadership programs to other organizations.

These are possibilities only and, whatever their merits, they will not in themselves assure the sustainability of PLLC beyond the ten year agreement with the provincial government. That will require additional resources from government and philanthropy or a university commitment to operating budget support.

Merits of PLLC Academic and Co-curricular Programming

A second year of operation is too soon to assess these but some observations can be made. I heard no criticism of the academic programming; on the contrary, those in the university who had an opinion on the subject viewed it positively, and PLLC staff and students are enthusiastic about its quality. Some concern was expressed about its demanding nature for students already taking a full course load but this could be alleviated if PLLC courses were approved as electives for credit in all faculties.

Banister Research Associates has been commissioned to undertake a review of the co-curricular programs, and some results from their questionnaires are expected by year end. In the interim I would suggest that the stretch program appears to be unfocused. Clearer criteria are needed to identify what is (and what is not) a stretch program as distinct from paid summer employment. It has been suggested above that the \$5 thousand award for all students in the program be used instead as a credit toward fees in Peter Lougheed Hall. An alternative might be to commit some of these funds to needs based bursaries.

I heard that the mentorship program is developing as planned. Forty mentors have been recruited and demands on them are highly variable. They are available to those who seek them out but are not assigned to students, and this might be reconsidered. The Banister review should provide more information on this subject.

The most challenging concerns were those expressed about the relationship between this program and other leadership initiatives at the University of Alberta. The external origins and early implementation of the PLLC initiative meant that there has been no wider university consideration of its nature and availability. GFC approval of the certificate was a positive step but it was after the fact and not a substitute for systematic attention to program structure and availability, and to the relationship between PLLC and other U of A leadership commitments.

The sustainability issue is germane here. PLLC's long term sustainability requires that it be embedded within the university. It may be time to commission a university wide council of deans or associate deans and students to work with college leadership to this end.

PLLC's Sustainability in Leadership, Governance and Finances

The third of these, finances, has been addressed above and I repeat for emphasis: PLLC has short and long term financial sustainability issues that must be addressed now.

The college has dedicated and creative leadership but on account of its origins, and its designation as an administrative rather than an academic unit, appointment and succession processes did not receive the attention usually devoted to them in the university context.

PLLC's governance arrangements, including the present Academic Oversight Committee, are ad hoc and fall short of what will be necessary to embed PLLC within the university and assure its sustainability. The administration of PLLC should report to the provost's office rather than to the university president, with the resources of that office committed to early consideration of appointment and reappointment processes, and to the role of PLLC in the wider university.