



Strategic Outlook 2019–2022

The School of Public Policy
University of Calgary

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Executive Summary

Background

The School of Public Policy at the University of Calgary, true to its vision, is Canada’s leading policy school.

When the School was formed in 2009, founders made the decision to focus ruthlessly on impact and relevance, establishing a research program attuned to the real-world needs of Canadian decision-makers in the public and private sector and training students that can make immediate impact on policy upon graduation.

This year, the School of Public Policy (the School) is celebrating its tenth anniversary and launching its next Strategic Outlook. This new Outlook suggests we should continue on the path of excellence devised by the founders, whether it is to conduct research and offer advice in specific areas of expertise or to develop real-world policy skills in the students registered in our programs. Yet, a more challenging economic and political environment will also test the School’s stature and performance and demand sustained efforts to maintain short-term responsiveness and long-term significance.

If the direction is the same, therefore, the pace must be different. The School is experiencing a change in momentum that requires new resources and more discipline in the conduct of its operations. It is at a point where progress is no longer possible without accepting modifications to our strategic orientations and in our operating practices, possibly in our structure.

Strategic Planning Process

In order to create this Strategic Outlook for the years 2019–2022, the School first began a rigorous consultation exercise to revisit the Mission, Vision, and Values and ensure they were aspirational and inclusive of all the different parts of the School and its functions. External consultants were engaged to assist with surveys, interviews, and facilitated discussions in order to garner the input of all members of the School’s community — staff, faculty, students, alumni, donors, leadership, etc. Information gathered during these exercises was distilled and discussed in numerous fora. Thorough consultation was sought with a number of key stakeholders, including the School’s Advisory Council and executive, as well as leaders of different functions in the School, before submission to the Board of Management for final review. This process has resulted in a comprehensive, detailed Outlook that will guide us through the next three years and into the future.

Highlighted Successes

In the environment in which the School currently operates, it is necessary to rise above both academic competitors as well as research institutions that compete for attention in the policy

sphere. What clearly sets the School apart is its ability to bridge the gap between academia and public affairs, by making academic research relevant and accessible.

In fact, since the official launch of the School, many of the initial goals and aspirations have been met successfully. Throughout our many conversations around the new Strategic Outlook, it became very clear that the School is best known for two things: its research and the Master of Public Policy (MPP) program. The School is perceived in Canada and internationally as a reliable source of data-driven, dynamic, and authoritative policy analysis and advice. Our graduates are well-prepared for the demands of the competitive and demanding policy workplace. Recently, however, with more demands and the development of more ambitious research platforms, we have begun to push against existing limitations.

Research & Outreach

The School's research portfolio encompasses many of the key policy topics and issues present in our society today. By encouraging interdisciplinary collaboration and diversifying the research undertaken, the School guarantees its relevance to governments, industry and policy-makers. Having four distinct research divisions is an organizational advantage, notably by providing focus, expertise and (media) visibility, and the wide variety of expertise and specializations within the School allows for interdisciplinary research so that policy issues can be analyzed and evaluated from a variety of perspectives.

However, not surprisingly considering its early foundations, the general consensus is that the School's strengths and reputation come from its fiscal and energy policy divisions. The School is determined to remain focused on these flagship programs while expanding its efforts to include additional topics of interest.

Teaching & Training

The focal point of teaching and training at the School is the MPP program. The foundational tenet of the program is the commitment to prepare students to immediately begin making a contribution to public policy upon graduation; more than 90% of our graduates are employed in a policy-related role within six months of graduation.

The new academic year, 2019–2020, will see the arrival of a new, well-established graduate program at the School: the Master of Science in Sustainable Energy Development (SEDV). This program will complement the activity within the MPP program, as well as our research and outreach, particularly that conducted by the Energy and Environmental Policy division and the Extractive Resource Governance Program.

Our Extractive Resource Governance Program (ERGP) offers training and capacity-building programs tailored to the specific needs and timelines of each client's country. This is done

through the delivery of our non-academic certificate program, customized workshops, and online seminars.

The School intends to leverage the success of the MPP program in the next three years by working to establish academic-credit certificate programs in selected areas of public policy. In addition to these plans, the School aspires to offer a formal part-time stream for the MPP program. Further, the School will begin feasibility studies into the creation of a Doctor of Public Policy (DPPol) program. This would be designed for students who have completed the MPP or an equivalent program and are seeking a leadership role in public policy and would round out the graduate programs offered by the School.

International Activity

The original vision of the School was one of global reach and presence, and once the School was well positioned within Alberta and Canada, concentrated efforts began to establish the School globally. In the last three years, significant progress has been made, with current initiatives underway between the School and Atlantik-Brücke (Germany), the German Economic Institute, Goodenough College (UK), and the Canadian Global Affairs Institute. Moreover, activity conducted by ERGP and through our Multi-Faces of Israel MPP course continues to strengthen our relationships with a variety of international partners. Up until this point, the School's established international commitments were initiated at the request of particular donors (e.g.: Germany, Israel) or as the result of business development initiatives (e.g.: Mexico). A number of countries and cities have been identified as ideal future partners to mobilize the School's international growth and development, including Singapore (Asia), Brussels (Europe), and the USA.

Sustainability & Funding

The size and scope of the School's operations have always been dependent upon its ability to secure external funding, which has resulted in the adoption of a prudent approach to managing resources. The School is cognizant of the need to mitigate current economic realities by diversifying its donor base and funding sources. The strategic direction for sustainable funding for the next three years includes a heightened focus on UCalgary base budget funding, philanthropic gifts, grants, and contracts.

In addition to philanthropic gifts and sponsorship fundraising, the School will increase focus on grant applications and research contracts in order to successfully secure funding for a variety of research projects and outreach activities, continuing to maintain a structure that emphasizes growing cooperation and collaboration among the research divisions. In addition to the new graduate program, the School will continue to seek opportunities intended to generate additional revenue, such as executive training programs, additional certificate or diploma programs, workshops, conferences, and seminars.

Strategic Goals

With this new Strategic Outlook, previous objectives were examined and evaluated, and new strategic goals and achievement measures are laid out to ensure the continued success and development of the School of Public Policy as Canada’s leading policy school. The Outlook is consistent with the School’s celebrated accomplishments in research, training, and outreach.

The School has five strategic goals over the next three years:

- **To leverage the tools necessary to maintain position as Canada’s leading policy school.**
- **To produce timely, independent, fact-based, high quality research that directly impacts public policy in Canada and beyond.**
- **To provide robust, in-depth teaching and training programs that attract the best students from Canada and, increasingly, from around the world.**
- **To be recognized internationally as one of the world’s leading policy schools, as much because of its superior expertise as because of its innovative training approaches.**
- **To continue to diversify funding sources while remaining independent and non-partisan.**

The development of a new Strategic Outlook provided the opportunity to reflect on our many achievements since the founding of the School ten years ago. Building on our proven areas of strength and well-earned reputation is an important part of our strategy. The Strategic Outlook presented here will provide a pathway for us to follow and a set of guidelines to be sure we stay true to our roots and vision.

Strategic Goals and Achievement Measures

		Short-term (Three Years)	Medium-term
Goal: To leverage the tools necessary to maintain position as Canada’s leading policy school.			
1.	Launch process to become autonomous academic unit within the University.		<input checked="" type="checkbox"/>
2.	Take advantage of UCalgary excellence to establish collaborative, globally recognized research platforms.		<input checked="" type="checkbox"/>
3.	Develop communications plans and strategies to best utilize social media and other non-traditional media outlets to disseminate our research and impact.	<input checked="" type="checkbox"/>	
Goal: To produce timely, independent, fact-based, high quality research that directly impacts public policy in Canada and beyond.			
1.	Meet requirements for deliverables and outputs for Canadian Northern Corridor program, as per grant agreement, by October 2022.	<input checked="" type="checkbox"/>	
2.	Complete all required deliverables for BC Basic Income project, as per contract, by January 2021.	<input checked="" type="checkbox"/>	
3.	Continue to expand the number of interdisciplinary projects and those that cut across numerous research divisions at the School.	<input checked="" type="checkbox"/>	
4.	Strengthen research collaboration between the School and UCalgary to leverage the respective strong points of each.		<input checked="" type="checkbox"/>
Goal: To provide robust, in-depth teaching and training programs that attract the best students from Canada and, increasingly, from around the world.			
1.	Create at least two academic certificate programs that offer laddering and part-time options to MPP students by 2022.	<input checked="" type="checkbox"/>	
2.	Explore the viability of the creation of a doctoral program in public policy, by conducting a feasibility study by 2022.	<input checked="" type="checkbox"/>	

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3.	Increase number of faculty members by two per year for next three years.	<input checked="" type="checkbox"/>	
4.	Expand number of admitted students to graduate programs to 80 by 2022.	<input checked="" type="checkbox"/>	
Goal: To be recognized internationally as one of the world’s leading policy schools, as much because of its superior expertise as because of its innovative training approaches.			
1.	Double number of strategic international partnerships from four to eight by 2022.	<input checked="" type="checkbox"/>	
2.	Establish intensive country-specific course, similar to the Multi-Faces of Israel program, with a new country, by 2022.	<input checked="" type="checkbox"/>	
3.	Increase the number of annual workshops and certificate-delivery sessions by the ERGP from 6 to 10 by 2022.	<input checked="" type="checkbox"/>	
Goal: To continue to diversify funding sources while remaining independent and non-partisan.			
1.	Broaden base and diversity of philanthropic gifts and secure gift with naming rights to the School by 2022.	<input checked="" type="checkbox"/>	
2.	Increase number and value of successful grant competitions, with a goal of \$3 M by 2022.	<input checked="" type="checkbox"/>	
3.	Increase base funding envelope from University of Calgary to 40%.		<input checked="" type="checkbox"/>
4.	Develop contractual research agreement with federal government to replace or renew Western Economic Diversification contract.	<input checked="" type="checkbox"/>	

Introduction

A Strategic Outlook for the School of Public Policy

The School of Public Policy at the University of Calgary is Canada’s leading policy school. The School owes this enviable position in large part to the strategic vision of its founders and their determination to see it carried out. Dr. Jack Mintz and his colleagues decided to focus ruthlessly on impact and relevance, by establishing a university-based research institute modelled on a think tank, attuned to the real-world needs of Canadian decision-makers in the public and private sector. The founders also made sure the students trained at the School were ready to use their skills to advance goals such as good governance, sustainable communities, and prosperity.

The School of Public Policy’s achievements in the last decade have been breathtaking, but the test of our stature and performance will be the ability to adapt to a more challenging environment. Unquestionably, the demand for evidence-based, well-conceived, and feasible policy solutions is still strong, as is the need for highly qualified policy analysts and advisors. Yet, it is also true that public institutions are now facing threats of a different magnitude. Past expectations of a steady spread of freedom and democracy have given way to a disturbing rise in the number of authoritarian regimes and failed states. The tangible benefits of globalization are endangered by a return to interventionism and protectionism, an existential challenge for a trading nation like Canada. The fabric of our societies is transformed by rapid demographic changes prompted by aging and migrations, without even considering environmental impact. Last but not least, the climate change debate and the uncertainties associated with any prescribed course of action add to an overwhelming impression of political deadlock, in sectors as diverse as energy, foreign policy, or even health care.

There is an even greater need for the role that the School of Public Policy plays in this context. A role that we must play as an *internationally* leading centre for policy research and policy training. None of the major problems we face are limited to Canada, even less to Alberta or to our hometown of Calgary. In effect, to act locally with efficiency and lasting success, we must not only think globally, as it is commonly said, but advance solutions that use the best expertise available worldwide, the most reliable data, and a truly interdisciplinary perspective on methods. While preserving the core dimensions that made it rise to national pre-eminence, the School is at a point where progress is no longer possible without accepting changes in our strategic outlook and in our operating practices.

In this vision in which the School of Public Policy strives to attain recognition as a member of a small group of globally leading policy schools, the original purpose and the innovative approach to policy research will stay the same. We shall continue to be focused on the impact of our work, as measured by its resonance in public debates and its direct influence on decisions. We

will preserve our independence from all ideological or partisan interference, while retaining a mixed funding model that privileges engagement and forces us to stay relevant. As we did when we first established our acclaimed Master of Public Policy program, we will attempt to emulate the world's teaching and training best practices, under the guidance of a group of experienced policy leaders and renowned subject experts.

The four signature research areas currently covered by the School of Public Policy grew organically from an initial emphasis on sound fiscal policies and sustainable and prosperous communities. Given the location of the School, energy and environment quickly imposed themselves as essential fields of expertise and gave rise to our first international activities. Opportunistic hires and new funding also helped build capacity in important sectors such as fiscal policy, social policy, and trade and foreign policy. This process facilitated the School's recruitment of highly qualified researchers, passionate about their areas of expertise and accepting of the open and nimble working culture of a policy unit.

At the same time, however, our research capacity tends to be limited. The School is highly vulnerable to career changes within the ranks of research personnel or to variation in the motivation of its lead faculty members. Expertise in a given area is sometimes limited to one individual. Integration between disciplines or methodologies is difficult to achieve. Long-term planning tends to be avoided, even when major projects would require lasting commitments. Recently, with more demands and the development of more ambitious research platforms, we have begun to push against existing limitations. To achieve consistency and excel in the selected domains where it seeks recognition and influence, the School needs to grow its capacity. We are talking here of an augmentation in the number of research positions by adding two to three each year, with a proportional increase in support and outreach staffing.

Obviously, a call for increased capacity should not be heard as a call for the end of the entrepreneurial spirit of the School's first decade. Crucial decisions on the conduct of research must continue to rest with our area experts. They should also keep the primary responsibility for disseminating results and making recommendations. Universities tend to emphasize freedom and self-determined objectives, but the School can count on its original funding model to help guide its staff. In effect, nothing that we do is pursued for long without the active support of the research end-users. Add to it a culture in which orientations are decided and monitored collegially, as if by the partners of a consultancy firm, and the balance between creativity and cohesive, purposeful action could be maintained.

Methodology

The first stage of the development of the new strategic outlook was to revisit the School's Mission, Vision, and Values. A number of staff and faculty members created an ad hoc Values Committee and, through several consultation exercises with the School's community and

stakeholders, created an updated set of guiding statements. Second, after consultation with other faculties and departments, Academica Group Inc. was selected as an external consultant to help us gather feedback and input from our community and stakeholders and to determine the current context in which the School operates. Academica is Canada's largest research and consulting organization focused exclusively on the higher education sector.

Academica's consultants employed a variety of research methods to gather information, including online surveys with staff, students, faculty, alumni, Fellows, and executive training clients; one-on-one telephone interviews with members of the Board of Management, Advisory Council, and select alumni; and two facilitated group discussions with representatives from faculty, staff, students, and alumni.

The resulting information and environmental context are incorporated into the relevant sections of the Outlook, as is the feedback acquired during a series of strategic planning retreats that took place with senior leadership and faculty members. A special Town Hall with all staff and faculty was also held that garnered additional comments and suggestions for the document. These events provided valuable insights for the planning committee and allowed participants to reflect on the history and future of the School.

The Outcome

This strategic outlook covers the period from 2019 to 2022. It is consistent with the School's celebrated accomplishments in research, training, and outreach. It suggests we should remain on the path of excellence devised by the founders, by continuing to conduct research and offer advice in specific areas of expertise and developing real-world policy skills in the students registered in our programs.

If the direction is the same, however, the pace must be different. The School is experiencing a change in momentum that requires new resources and more discipline in the conduct of its operations. The success of our major research platforms is dependent on the coordinated work of large multidisciplinary teams. Our teaching must adapt to meet the requirements of a very different policy landscape, if only because of the impact of data analytics and new decision algorithms. The way we disseminate our findings and interact with the users of our research cannot be limited to traditional vehicles such as the established media or the academic presses.

The School has embraced and aligned with the University of Calgary's wider strategic goals, including the Eyes High strategy and related foundational commitments. One of the primary reasons that the School continues to thrive is the dynamic pursuit of excellence across the entire UCalgary community. The School, alongside other academic units, benefits from the University's unwavering adherence to the foundational commitments of Eyes High: to sharpen focus on research and scholarship, enrich the quality and breadth of learning, and integrate the university with the community. These three tenets inform the activity of the School on a daily

basis, as we strengthen existing connections with the community, our students and alumni, and other units at UCalgary. By incorporating the additional pillars of student experience and campus culture into everything we do at the School, it ensures that we foster robust connections between our students and the School, as well as the entire UCalgary community. Further, collaboration across faculties and units — and approaching our work with an interdisciplinary lens that considers the perspectives of others — creates an environment that welcomes open dialogue and purposeful engagement, furthering the missions of the School and the University.

In the following pages, different constituencies within the School’s ecosystem provided a general strategic overview of their sector of activity. It includes, of course, themes such as research, training, and outreach, but it also makes room for our growing portfolio of international activities and for a succinct analysis of our funding situation, now and in the future. These sections are preceded by an evaluation of the impact of the School’s previous strategic plan and a summary of the environmental scan conducted by Academica. The document includes a summary table of the strategic goals and achievement measures that directly derive from the Outlook.

Box 1: Canada's Leading Policy School

The School of Public Policy is Canada's leading policy school, not only because of our citations and broad coverage in national media, but because of our unique approach to policy education, research, and impact:

1. The School's Master of Public Policy program was originally modelled on programs offered by the best policy schools around the world, with an integrated set of courses designed specifically for the MPP degree. At the time in Canada, degree-bearing policy training consisted mostly of a patchwork of courses borrowed from other programs in social science, law or business. Yet, it is now well established that only a series of dedicated courses progressing from the fundamental concepts of policy science and policy analysis to the more advanced approaches to evidence-based decision-making can actually prepare students to imagine policy solutions that are feasible and sustainable and meet the needs of their future employers. To achieve this goal, the School works in partnership with its surrounding community and takes advantage of being part of one of Canada's top research universities.
2. The School is the most cited policy school by Canadian media. Our research also has a growing echo in academic publications and in many sectors of policy practice and trade. It is the direct influence of our work on policy decisions at all levels of government, on a multitude of topics as diverse as national sovereignty, taxes, emissions pricing or social policy, that truly distinguishes the School. Most, if not all, of our faculty members and Executive Fellows have concrete experience in policy development and policy implementation. Their expertise is regularly sought out by the media and government to provide a real-life perspective on the crucial issues that our country faces, and they are trusted to contribute solutions based on evidence and facts.
3. One important reason that explains why the School was able to stay current and relevant is its funding model. A large proportion of the School's resources are the fruit of a determined strategy to associate the end-users of our research to its financing. If no one is interested in a particular line of research, whether because it has no credible policy application or is already out-of-date, it won't be pursued. Support ranges from large public research grants or contracts to small contributions from not-for-profit organizations, by way of donations and sponsorships from the private sector. In the end, moreover, the diversity of our funding sources and close adherence to the most demanding academic standards has preserved our independence and integrity and established our reputation as a leading source of credible policy advice.

Report on Previous Strategic Plans

Since the official launch of the School in May 2009, many of the initial goals and aspirations have been met successfully. The original plan for the School (2009–14) included a significant research component with the aim of establishing the School as a premier institution, focusing on provincial issues in addition to national and international. A unique aspect of this plan was to combine a think tank with a high-quality academic program. The Master of Public Policy (MPP) program was modelled on public policy programs across North America, particularly those that were designed around a core group of dedicated courses, and not a patchwork of existing courses from other departments. The initial target number of students was 35 in total for the first few years on a cost-recovery basis, this has now expanded to 45–50 students.

Under the initial strategic plan, it was determined that the School would not immediately be established as a faculty at the University, but first would operate as an institute with a teaching program. The model requires the secondment of faculty from other areas of the University, which has become progressively problematic due to the increased demands on the School's resources and the changing make-up of the academic staff.

During the tenure of the original five-year strategic plan, several conscious changes were made, including the decision not to develop a doctoral program until the School and the MPP program were better established. However, two joint programs were introduced: the MPP/MBA (the first in Canada) and the MPP/JD program.

The research programs were originally grouped under three primary policy areas: Economic and Social Policy, Energy and Environmental Policy, and International Policy. Individual programs within each area were designed to be funded for a specific length of time, with some flexibility around the duration, depending on sector needs and donor interest. A number of key programs have proven to be immensely successful and are still in operation. Others have emerged for a predetermined length of time and then concluded after specific research output goals were met. With the arrival of Dr. Pierre-Gerlier Forest as Director and James S. and Barbara A. Palmer Chair in Public Policy, the School underwent a reorganization of its research areas to better reflect the programs and topics of current focus. This will be described further down.

The original organization of the School is still in effect, divided between the academic and research sides with directors for each. The Academic Director is responsible for degree programs, appointments, internal operations, and ongoing academic and administrative relations with other parts of the University. The Research Director is responsible for the development and monitoring of research programs including publications and events. Area Directors (now called Scientific Directors) are responsible for managing all research programs in their area as well as being involved with funding and staffing within the programs. They supervise Program Directors who handle academic work related to funded programs as well as

supervising Fellows and research associates working in the program. The Director of the School is responsible for its overall operations, fundraising, program development, and budget.

Box 2: History of the School

In the mid-2000s, the University of Calgary was interested in experimenting with self-sustaining units, or institutes, outside of the regular faculty structure. These institutes would operate on a model similar to a think-tank, and would focus on applied research. They were designed to be self-sustaining in order to foster innovation and independence.

The School of Public Policy was founded in 2008 on the above model by a small group of individuals involved with the University of Calgary's Institute for Advanced Policy Research (IAPR), led by Dr. Ron Kneebone. This group recruited Dr. Jack Mintz to be the inaugural Palmer Chair in Law and Public Policy (later renamed the James S. and Barbara A. Palmer Chair in Public Policy) and Director of the School.

Since that time, The School has pursued excellence in providing a practical, global and focused approach to public policy research and education. The following are some key milestones in The School's development:

- ▶ January 2008 - The School of Policy Studies established (note subsequent name change)
- ▶ January 2008 - Dr. Jack Mintz appointed Palmer Chair in Law and Public Policy and Director of the School
- ▶ August 2008 - Five-year business plan developed
- ▶ May 2009 - The School of Public Policy official launch, netting \$1 million in donations
- ▶ Fall 2011 - First cohort enters the Master of Public Policy program
- ▶ Fall 2011 - School of Public Policy moves to downtown campus
- ▶ 2014 - First students enter joint MBA/MPP degree program
- ▶ July 2015 - Dr. Jack Mintz steps down from the School
- ▶ 2015-16 - The School is officially recognized by UCalgary General Faculties Council
- ▶ March 2016 - Dr. Pierre-Gerlier Forest appointed Director and James S. and Barbara A. Palmer Chair in Public Policy
- ▶ 2018 - First students enter joint JD/MPP degree program

The initial governance plan of the School included a Board of Management co-chaired by the Provost and Vice-President (Research) with the Deans from Arts, Law, and Haskayne School of Business and the Director of the School. An external Advisory Council consisting of donors, stakeholders, and industry representatives was established to provide advice to the Director and the School. Various programs established their own advisory groups.

With the completion of the first five years of the School and the creation of the next strategic plan (2015–2019), the opportunity was present to closely examine original aspirations and

reframe the School's short- and long-term goals in the context of the time. In addition, Dr. Forest's arrival in the spring of 2016 created the occasion to undertake some reorganization of research areas, governance structures, and operational units.

The research areas were reorganized from three to four and renamed to reflect the increased bodies of research undertaken. The four research divisions are Fiscal and Economic Policy (FEP), Energy and Environmental Policy (EEP), Social Policy and Health (SPH), and International Policy and Trade (IPT). All of the research divisions include a number of research programs that are more narrowly categorized based on the specific research conducted (e.g.: Tax and Economic Growth, Energy for Life, etc.).

The governance structure underwent some changes, notably to the make-up of the Board of Management. The board is chaired by the Provost of the University, with membership consisting of the Vice President (Research); the Director of the School; the Chair of the Advisory Council; the deans from the Haskayne School of Business, Faculty of Law, Faculty of Arts, and a rotating faculty (currently Cumming School of Medicine); the Academic Director of the School; the School's Director of Research; and representatives from both the MPP Alumni Council and the current MPP Student Council. The expanded representation on the Board is designed to better communicate the diverse needs and perspectives of members of the School's community.

Further to the above reorganizations, some restructuring of organizational units was carried out. The School formally adopted a "4++4" model of operation, with four well-focused research sectors supported by four operational units aimed at amplifying the School's policy impact, all working shoulder to shoulder with educators and a wide network of practitioners. In this model, the four research divisions plus the MPP and the Extractive Resource Governance Program (ERGP), are amplified by four support teams: Engagement, Development, Communications, and Operations. With the formal outlining of the significance of the support units as related to the research divisions and educational programs, the focus on dissemination and communication of our research is emphasized. We have now added a third "+" to our model, to represent the new Master of Science in Sustainable Energy Development program.

With this new Strategic Outlook (2019–2022), previous objectives are being further evaluated and new strategic goals and achievement measures are included to ensure the continued success and development of the School of Public Policy as Canada's leading policy school. The most recent strategic plan (2015–2019) contained sixteen objectives, fifteen of which have been accomplished or are currently in progress. One of the objectives has not yet been undertaken, but has been assessed as low priority and having less overall impact on the School's success. The chart on the following pages outlines these objectives and their current status, with explanatory notes relating to re-evaluations following.

Box 3: Organization of the School

4+4

4 research sectors amplified 4 ways for bolder, practical policy solutions

A unique model in which four well-focused research platforms are supported by four operational units aimed at amplifying the School's policy impact, all working shoulder to shoulder with educators and a wide network of practitioners.

"The School of Public Policy invests as much in dissemination and communication of our research, as it does on the research itself. Research never goes on a shelf to die. That makes The School truly unique."

Dr. Pierre-Gerlier Forest
Director and James S. and Barbara A. Palmer Chair,
The School of Public Policy

28
SUPPORT &
OPERATIONS STAFF

25
RESEARCH
ASSOCIATES &
ASSISTANTS

14
FACULTY

53
STAFF

76
FELLOWS

4 RESEARCH SECTORS

Social Policy and Health

Energy and Environmental Policy

Fiscal and Economic Policy

International Policy and Trade

PLUS

+ Master of Public Policy

+ Extractive Resource Governance Program

+ Master of Science in Sustainable Energy Development

AMPLIFIED BY

4 SUPPORT TEAMS

Engagement
Development

Communications
Operations

RESULTS



50+
EVENTS EACH YEAR

2,134
ATTENDEES IN 2016



Most cited
POLICY SCHOOL IN CANADA



95%
OF MPP GRADUATES PLACED IN POLICY-RELATED ROLES OR UNDERTAKING FURTHER EDUCATION



50+
POLICY REPORTS EACH YEAR

	Objective/Goal from 2015–2019 Strategic Plan	Completed	In-Progress	Re-Evaluated
1.	Continue to strengthen the career development and placement activities for MPP students.	<input checked="" type="checkbox"/>		
2.	Consider adding specialized streams of study to the MPP program.		<input checked="" type="checkbox"/>	
3.	Develop and implement certificate, diploma and ‘laddered’ MPP programs for delivery in Edmonton and possibly other capital cities.		<input checked="" type="checkbox"/>	
4.	Expand executive education programs, particularly in areas such as Extractive Resource Governance. Obtain approval to grant a non-credit certificate from UCalgary for these programs.	<input checked="" type="checkbox"/>		
5.	Develop and implement a strategy to continually engage alumni involving such things as a Homecoming Dinner to recognize an important contributor to the growth of public policy in Canada, a standalone event for alumni, scholarship holders and scholarship donors, and a forum featuring the best capstone papers prepared that year.*	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
6.	Continue to take every opportunity to maximize impact by producing well-grounded academic work and engaging directly with leaders in the policymaking, corporate, professional and nonprofit worlds.	<input checked="" type="checkbox"/>		
7.	Expand efforts to measure the impact of the research in academic and policy circles.		<input checked="" type="checkbox"/>	
8.	Leverage work to produce even more accessible products based on research, with the aim of preserving and extending impact.	<input checked="" type="checkbox"/>		

9.	Revisit the School’s publication backlist with the aim of producing more annual or biennial publications on critical issues that evolve over time.**			<input checked="" type="checkbox"/>
10.	Complement media engagement with targeted and direct dissemination tools and social media, starting with improving information management in the School.	<input checked="" type="checkbox"/>		
11.	Re-brand SPPP Research Papers, the School’s key publication series, to a title like SPP Policy Review, to emphasize it is an online journal subject to the highest standards of review.	<input checked="" type="checkbox"/>		
12.	Clarify that the Research Director, with assistance from Area and Program Directors, oversees editorial decisions, and keep and publish summary statistics about the editorial process.	<input checked="" type="checkbox"/>		
13.	Appoint an external editorial advisory board, made up of highly regarded scholars with editorial experience, to review the editorial practices of the School annually.***	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
14.	Work with the University of Calgary to review and update the School’s guidelines for research integrity and transparency, including a framework for disclosing major sources of funding.		<input checked="" type="checkbox"/>	
15.	Formally communicate the School’s policy of open access to all research publications of the School and commit to making raw data public, unless the School’s collection or access to the data is subject to a confidentiality agreement or concern.		<input checked="" type="checkbox"/>	
16.	Develop and expand international partnerships to increase the reach and impact of the School.	<input checked="" type="checkbox"/>		

- * *Develop and implement a strategy to continually engage alumni involving such things as a Homecoming Dinner to recognize an important contributor to the growth of public policy in Canada, a standalone event for alumni, scholarship holders and scholarship donors, and a forum featuring the best capstone papers prepared that year:* Some changes have been made to this objective to better reflect the needs and preferences of our alumni community — it was decided that a “homecoming dinner” would instead be a social event around the MPP Alumni Council’s annual general meeting, and a student/alumni breakfast with donors has been established to allow for stronger engagement with our donor community. The third element has been realized, with both a Capstone Symposium that showcases the strongest capstone projects of the year, and the Robert Mansell Capstone of the Year Award, awarded at convocation to the student with the best capstone.

- ** *Revisit the School’s publication backlist with the aim of producing more annual or biennial publications on critical issues that evolve over time:* A number of publications are published on an annual basis, providing yearly updates on critical issues. At this point, there are no plans to evaluate all previous publications with the goal of producing annual updates.

- *** *Appoint an external editorial advisory board, made up of highly regarded scholars with editorial experience, to review the editorial practices of the School annually:* The School has established a Scientific Council of external experts and academics to provide advice and guidance on the research activity of the School. This council is not directly involved with the editorial practices of the School, but is engaged from a strategic perspective with research and publications strategy development.

Present Context of the School

The following section summarizes the research findings of Academica Group Inc., which, in consultation with the School, conducted surveys, individual interviews, and group discussions to inform the new 2019–2022 Strategic Outlook. This research addresses four topical issues: the impact of the School, the sustainability of its fiscal models and governance structures, the Master of Public Policy program (MPP), and the Extractive Resource Governance Program (ERGP).

Surveys

Online surveys were sent to the School's stakeholders, including faculty, staff, current MPP students, and MPP and ERGP alumni. The objective of these surveys was to determine the public perception of the School, while engaging stakeholders in the School's strategic planning process. In light of these goals, online survey invitations were sent to 382 individuals, with a 44% response rate. Methodologically, the survey was divided into two parts: the first, consisting of general questions for all stakeholders; the second, consisting of sub-group-specific questions.

Highlights

According to respondents, the School is best known for two things: its research (52%) and the MPP program (51%). On average, stakeholders rate the School highly on 'research quality and relevancy' and 'research dissemination.' 'Social media presence' and 'community engagement' are rated less favourably.

In terms of attracting MPP applicants, just over half of the current students and alumni credit the School's website for making them aware of the program (53%). Further, the majority of respondents used the website to determine whether or not they should apply (93%); the remainder relied upon either family members and friends, or teachers and professors. Over half of the respondents accepted their offers of admission based upon the following criteria, listed in order of importance: program length (84%), location (68%), employment prospects (56%), and scholarships/financial aid (56%). According to students and alumni, the most attractive alternatives to the School are the University of Toronto (32%) and Simon Fraser University (24%).

Unlike MPP students and alumni, however, 40% of ERGP clients claim to have heard about the program through a friend or colleague; 20% received an email from the program provider; 20% received an internal or departmental communication; and others could not recall how they had learnt about the program. When asked why they chose the ERGP, 60% of respondents based their decisions on the positive reputation of the program.

In order to disseminate research more broadly, many employees indicated that the School ought to build 'more bridges with decision-makers' (64%), 'improve social media presence'

(47%), and ‘hold more events featuring research’ (44%). In their view, successful events would contribute to ‘raising awareness and profile’ (54%), while ensuring ‘attendee satisfaction’ (42%). According to respondents, the School’s main research competitors are the Munk School of Global Affairs and Public Policy (ranked as the top competitor for 88% of respondents) and the C.D. Howe Institute (ranked as the top competitor for 60% of respondents).

Survey respondents also identified several key areas on which the School ought to focus, for future development. These include marshalling ‘evidence of concrete influence on policy’ (58%), building ‘partnerships with think tanks’ (36%), and cultivating an ‘international presence’ (36%). Stakeholders believe that the most important tenets of the School’s Mission statement are ‘to provide hands-on training in Canada and abroad through a Master of Public Policy program and the Extractive Resource Governance Program’ (62%); ‘to produce research that is respected because it is independent, credible, and based on hard data’ (60%); and ‘to drive policy discourse with relevant research, outreach and teaching’ (53%).

In terms of its affiliation with the University of Calgary (UCalgary), the majority of respondents agree that the relationship enhances the School’s research (76%, ‘agree completely’ or ‘agree somewhat’), teaching (75%, ‘agree completely’ or ‘agree somewhat’), and brand recognition (74%, ‘agree completely’ or ‘agree somewhat’). Respondents feel that the School’s funding model should be apportioned in the following manner: 41% should come from core University funding, 23% should come from philanthropic gifts and donations, 17% should come from grants, contributions, and sponsorships, 15% should come from contracts and research partnerships, and 4% should come from other sources.

Stakeholder Consultation

Individual Interviews

In order to ascertain the current challenges that the School faces, identify its prospects, and define future goals, Academica conducted individual and group consultations with stakeholders. These stakeholders included members from the Advisory Council and Board of Management, as well as two recent MPP graduates. In total, 13 telephone interviews were scheduled.

Participants were asked about the School’s Mission statement, reputation, challenges, research areas, enrollment levels, and competitors (both current and aspirational). They were also asked to speculate how postsecondary trends, along with the internationalization of the postsecondary education sector, would affect the School’s growth and development. Finally, they were asked what strategic planning methods would enable the School to remain Canada’s leading policy school and what would constitute a desirable outcome for the next round of strategic planning.

Highlights

In terms of the School's Mission and Vision, respondents indicated that the School ought to work to influence governmental and private sector decisions, and to drive policy discourse using independent and credible research. The general consensus is that the School's strengths and reputation come from its fiscal and energy policy divisions — however, participants see the health policy division, under the direction of Dr. Forest, as an emerging strength, and suggest fostering a relationship with the O'Brien Institute for Public Health at the University of Calgary to facilitate further growth. The feedback was clear that the School should leverage its success in fiscal and energy policy research by increasing attention to the health and social policy streams, to address current issues and student demands.

For many participants, the MPP program is what raises the School's profile. It is generally agreed that the quality of the program has ameliorated, and that, under the direction of Dr. Forest, the School has become more progressive and politically inclusive. One suggestion is to offer certificates for academic credit, such as a certificate in health administration or regulatory policy. In terms of pedagogy, stakeholders suggest a shift from lecture-based teaching to seminar-style lectures and stronger mentorship programs. Respondents cite the increased competition for students and researchers in recent years, especially with McGill, Queens, UBC, C.D. Howe, the Fraser Institute, and the Munk School of Global Affairs. For them, what sets the School apart is its ability to bridge the gap between academia and public affairs, by making academic research relevant and accessible.

As part of bridging that gap, stakeholders would like to see an update to the School's social media strategy and an increased online presence. This might involve shifting meetings and events online or generating content in the form of podcasts and YouTube videos.

As part of the new Strategic Outlook, stakeholders would like to see more collaboration between the School and UCalgary. Overall, respondents are pleased that the School is cultivating its relationship with main campus and are hopeful that this will lead to increased funding from UCalgary.

There is a strong desire to establish a financially stable funding model that balances independence, credibility, and sustainability. Further, respondents would like to ensure that the governance structure encourages collaboration, while honing expertise. Ultimately, stakeholders would like to balance municipal and provincial policy research with federal policy work, to strengthen the School's reputation as Canada's leading policy school.

Facilitated Discussions

In October 2018, Academica facilitated two group discussions with stakeholders, including faculty, staff, current MPP students, and MPP alumni. The consultant introduced the research project before leading the group through a series of questions about the School's research and

operations. The questions were based on preliminary themes that arose from the stakeholder surveys and interviews. The responses from both groups are highlighted below; they include details on favourable aspects of the School, its reputation, main competitors, struggles, communications strategy, and future opportunities.

Highlights

Participants state that what they love most about the School is the people — students, staff, and faculty — whom they describe as ‘collegial’ and ‘smart.’ What they like about the MPP program is its flexibility, built-in prerequisites, funding, integration with the downtown community, and tendency to produce successful and employed graduates. Researchers cite their enjoyment of interdisciplinary work, as well as the timeliness and relevance of the School’s research output. They are proud of the School’s influence on Canadian politics and, particularly, its dispassionately evidence-based research and events.

Participants identify the following competitors for the MPP program: UToronto, UBC, Queens (for government jobs), UAlberta (for provincial jobs), Carleton (for federal jobs), McMaster, SFU, Dalhousie, and McGill. The competitors for ERGP include Columbia (for sustainability), NRGi, Agri-team, and CIRDI. In the think tank sphere, the Fraser Institute, Canada West, C.D. Howe, the Centre for Policy Alternatives, and the Conference Board of Canada are the main alternatives.

Respondents expressed some concern about the School’s reliance on grants and its shifting donor base. They perceive that this model complicates long-term planning, and limits hiring because it necessitates finding UCalgary faculty partners. This creates challenges for younger faculty members that are still seeking tenure, who have to balance the demands of their home faculty or department and the School’s. The suggestion here is that the School develop a system of evaluating research contributions and community service that is grounded in policy impact and could be presented along with traditional academic accomplishments for the consideration of merit and promotion.

As noted in the interviews, participants would like to see improvements to the website, with more regular updates, a better search engine, and a calendar listing of events and deadlines. They also want more profiles of students, staff, and alumni available — including their latest accomplishments and ongoing research projects. Students, in particular, want to see comprehensive program descriptions and clear indications of courses that match areas of specialization. Participants feel that the School ought to streamline its communication strategy so that stakeholders receive fewer emails from fewer people, with consistent information about deadlines and events. Overall, stakeholders feel the School should integrate marketing and communications, to strengthen the School’s brand.

As part of this new Strategic Outlook, stakeholders want the School to foster multi-jurisdictional partnerships with businesses, think tanks, policy schools, and government, and provide more networking opportunities and a greater variety of speakers. They would also like to see improvements to the alumni mentorship program, particularly during the capstone phase, and the introduction of new research areas: including big data, immigration, and climate change policy. While stakeholders are pleased with the School's progress, the majority feel that the School's last Strategic Plan was scattered, and that the next plan should focus on perfecting a shorter list of priorities. Ultimately, stakeholders want the School to remain the go-to place for employers and decision-makers of all ideological stripes and jurisdictions.

Box 4: Cross-Appointed Faculty Members

Eugene Beaulieu – Arts (Economics)

Jennifer Winter – Arts (Economics)

Lindsay Tedds – Arts (Economics)

Ron Kneebone – Arts (Economics)

Robert Mansell – Arts (Economics)

Jack Mintz – Arts (Economics)

Jean-Christophe Boucher – Arts (Political Science)

Lisa Young – Arts (Political Science)

Kevin McQuillan – Arts (Sociology)

Jennifer Zwicker – Kinesiology

Pierre-Gerlier Forest – Medicine (Community Health Sciences)

Myles Leslie – Medicine (Community Health Sciences)

Box 5: Joint Projects and Research

Cumming School of Medicine

O'Brien Institute of Public Health

Department of Community Health Sciences

Department of Family Medicine

Faculty of Kinesiology

Faculty of Social Work

Faculty of Law

Haskayne School of Business

Faculty of Arts

Department of Economics

Department of Political Science

Centre for Military, Security and Strategic Studies

The Alberta Children's Hospital Research Institute

School of Architecture, Planning and Landscape

Faculty of Graduate Studies

Research & Outreach

The development of a new Strategic Outlook is an opportunity to reflect on our research achievements since the founding of the School ten years ago. It is also time to develop plans for the research that we will direct over the next three years and beyond. This section of the School's Strategic Outlook reflects a wide-ranging discussion of the state of the School's research programs held in January 2019 and will assist researchers and senior managers in developing research and budget plans for the coming years.

Background

Research activity at the School of Public Policy is organized around four research divisions:

- Energy and Environmental Policy (EEP), Scientific Director: Dr. Jennifer Winter
- Fiscal and Economic Policy (FEP), Scientific Director: Dr. Lindsay Tedds
- International Policy and Trade (IPT), Scientific Director: Dr. Jean-Sébastien Rioux
- Social Policy and Health (SPH), Scientific Director: Dr. Ron Kneebone

In addition, the Extractive Resource Governance Program (ERGP) sponsors applied research on fiscal, regulatory, and engagement policies as part of its executive education and advisory work in resource-rich jurisdictions.

A key outlet for the research conducted at the School is the *School of Public Policy Publications (SPPP)* series. The goals of the publication series are:

- To offer timely research and discussion of Canadian public policy issues.
- To provide a forum for the exchange of ideas and perspectives among academics, members of the private sector, public servants, and engaged community members.
- To disseminate research that is topical, has a clear message, and can be read and appreciated by a broad audience.

Since 2009, there have been 427 *SPPP* papers published. All publications are available to download, free of charge, from the School's website. Our research is also disseminated through more conventional academic channels — academic journals, chapters in books, and conference proceedings. In order to disseminate our research to a broad audience, our research is often promoted, with the help of our Communications team, through press releases, media interviews, and op-eds.

Review of Research Divisions' Past Accomplishments and Future Directions

This section provides an overview of the strengths of the School's research divisions and their future plans for priority research topics. A few major new initiatives are noted. However, long-term detailed plans are not provided here, in part because of the need to maintain the

flexibility to respond to new policy issues and take advantage of funding opportunities that emerge within each of the broadly defined research areas. Building on our proven areas of strength and well-earned reputation is an important part of our strategy. In some cases, consolidation of the research programs around areas of expertise will guide the direction of the programs in the future. Some opportunities for cross-cutting and interdisciplinary research are also noted.

Energy and Environmental Policy

The Energy and Environmental Policy research division (EEP) provides practical solutions to Canada's challenging energy and environmental policy problems. It fulfills its mandate by injecting evidence into policy debates and by engaging with decision-makers, stakeholders, and the public to create a forum for open and meaningful dialogue among different perspectives. EEP has played a major role in the research programs of the School since its inception, with specific research strengths in emissions pricing, market barriers and opportunities for Canada's oil and natural gas, energy regulation, and the measurement of the impact of energy infrastructure on the Canadian economy. The three primary programs in EEP are Energy for Life, Energy Policy and Regulatory Frameworks, and Canadian Northern Corridor.

Energy for Life is committed to providing ongoing analysis and critiques of new and current energy and environmental policies in a quickly evolving policy landscape. In addition to this responsive and timely output, the program also undertakes strategic long-term research on the evolution of Canada's energy sector.

Energy Policy and Regulatory Frameworks encourages informed and effective dialogue among policymakers, regulators, industry, consumers, and research organizations about innovative solutions to complex regulatory issues, including alternatives and reforms that can measurably increase Canada's prosperity through responsible development and regulation of energy sources and uses.

The Canadian Northern Corridor (NC) program investigates the feasibility of multi-modal transportation corridors in Canada's north and near north. These corridors would be designed to facilitate private and public investment in rail, road, pipeline, electrical transmission, and communications infrastructure, and provide a long-term solution to geographic, political, and economic challenges that seriously threaten the competitiveness, growth, diversification, and prosperity of Canada and its regions. The NC program will provide a coordinated and integrated plan for investment in national transportation infrastructure which will enhance regional and national development, expand interregional trade opportunities in Canada, diversify the economy, and strengthen Canada's ability to compete in global markets.

Fiscal and Economic Policy

The mandate of the Fiscal and Economic Policy research division (FEP) is to evaluate the fiscal and regulatory policies of federal, provincial, and municipal governments, and to propose alternative policies that improve the lives of Canadians. FEP consists of four research programs: Financial Markets Regulation, Sustaining Prosperity, Tax and Economic Growth, and Urban Policy, each with its own director.

Financial Markets Regulation examines the regulation of banking, insurance, and pensions to promote long-term economic growth and financial stability. Previous research topics include securities regulations and the exempt market, insider disclosure rules, and solvency funding rules for defined benefit pensions. Current and future research projects include regulation of corporate governance, increasing competition in the banking and insurance industries, analysis of trends in the IPO markets, and the regulation of Fintech.

Sustaining Prosperity is aimed at informing policies that expand and sustain Canada's competitiveness and the social and economic well-being of Canadians. Previous research projects have elucidated the meaning and significance of value-added industries, measures of economic diversification, and regulation of the telecoms industry. Ongoing and future research projects include the measurement of federal fiscal balances for each province since 1961, the role of the resource sector in the Canadian economy, and the opportunities for collaboration across these sectors in developing solutions to economic and environmental challenges.

Tax and Economic Growth (TEG) examines fiscal and taxation issues as they relate to growth, savings, innovation, productivity, and competitiveness. A TEG flagship publication is the annual calculation and presentation of the marginal effective tax rates (METRs) for more than 90 countries. A major achievement was extending the METR methodology to the evaluation of the tax and royalty regimes facing the oil and gas industry. The ongoing Alberta's Fiscal Future project has published a series of research papers on Alberta's fiscal situation and the policy options to address it.

The Urban Policy program (UPP) initially focused on municipal finances and property taxes, infrastructure investment, and land development issues, especially of mid-sized Canadian cities. Over the next three years, UPP will evolve to more broadly reflect an agenda of progress for Calgary and its citizens through research projects and community engagement in a variety of sectors of great importance for the city, from culture to economic development, from social programs to land use, and from transportation to the environment.

Over the next three years, a major focus of FEP research will be the Basic Income project that has been funded by the British Columbia government in collaboration with researchers at University of British Columbia and Simon Fraser University. Other major research initiatives are planned around comprehensive tax reform, reforming the fiscal relations between the

provincial and federal governments in Canada, and using public procurement by subnational governments and educational institutions to promote innovation.

International Policy and Trade

The International Policy and Trade research division (IPT) conducts policy research in order to improve Canada’s position in the global economy, and to enhance Canada’s influence in bilateral, international, and multilateral fora. IPT is organized around three programs: International Trade, Market Diversification, and Security and Defence.

The International Trade program examines the issues that affect Canada’s trade agreements and policies as well as the changing international environment and market opportunities for Canadian industries. Key research activities revolve around the Trade Experts Annual Roundtable and involve analysis of trade agreements with the United States and Mexico, the European Union, China, and the Trans-Pacific Partnership.

Over the next three years, research will focus on social and economic factors that lead to the rise of protectionist policies; free trade opportunities with the UK which will soon be out of the EU; and labour mobility issues in the 21st century. These topics reflect an increasing emphasis on the trade and security nexus as new technologies disrupt global markets and global security threats evolve.

The Market Diversification program examines Canadian trade and investment opportunities within the broader strategic framework of international diplomatic and security challenges. While market opportunities throughout Asia is an important focus for the program, the program considers issues related to competitiveness with other trading blocs including Europe, the United States, and Mexico. The program has explored opportunities for Canadian exports of natural gas and dairy products, membership in the Pacific Alliance, opportunities with Association of Southeast Asian Nations (ASEAN) countries, and the opening of the northern sea routes to Asia.

The Security and Defence program analyses and develops policies related to Canada’s national security in its broadest sense, including the physical protection of our borders, Canadian assets abroad, cybersecurity, and international diplomatic relationships. A flagship publication is the annual report on the status of military procurement in Canada along with other papers on defence procurement issues.

As noted above, over the next three years the Security and Defence program will focus on “security of trade” issues, involving not only trading of “things,” but also financial services as well as cyber and other security implications of trade — resource work overseas with dangers of kidnapping, ensuring the security of market access, trade infrastructure, and access to foreign investment that meets security objectives.

Social Policy and Health

Research by the Social Policy and Health research division (SPH) is aimed at improving the lives of Canadians by assessing existing and proposed public policies, with a focus on populations made vulnerable due to ill-health, disability, age, abuse, violence, and poverty. The division's key strength is its close engagement with the populations and organizations that are impacted by its research. SPH is currently a leading source of policy research in areas such as disability policy, homelessness, benefits to vulnerable populations, and immigration. The division focuses on quantitative research methods and has developed large datasets that allow for evidence-based evaluations of social and health policies. Important in this regard are a number of administrative data-sharing partnerships that have been developed with the Government of Alberta, Statistics Canada, Calgary Police Service, and agencies which aid in the transition of refugees and asylum seekers to life in Canada.

SPH is organized around two programs: Social Policy and Health Policy.

The Social Policy program provides evidence-based assessments of the potential for reforming the way social programs are designed and delivered. Particular focus has been on homelessness and poverty alleviation but recently it has worked to develop a research program investigating issues related to immigration and people seeking asylum. The Social Policy program is recognized in the community as a reliable and impartial contributor of practical policy advice, a recognition that is reflected in the fact it receives funding support from, and is a trusted partner in research projects with, 11 social agencies, Calgary Police Service, the Calgary Catholic Immigration Society, the Calgary Homeless Foundation, and the Alberta Ministry of Community and Social Services. Research in this area has had an important impact on the design and funding of programs designed to alleviate homelessness, and has also established for Canada a practical understanding of what it means to end homelessness.

Over the next three years, the Social Policy program will expand its focus to include immigration and refugee issues, which align well with research into other vulnerable populations. The linking of large administrative data sets will enable a deep and finely detailed examination of a wide range of social policy issues.

The Health Policy program investigates the organization and financing of health care and evaluates health promotion initiatives. A key focus is the analysis of policies aimed at reducing the burden carried by families of persons with cognitive and physical disabilities. Working closely with those active in the Social Policy program and in close consultation with governments and agencies who deliver health programs, the Health Policy program also examines ways to improve the health status of vulnerable populations, including the poor, the homeless, and persons with disabilities. The Health Policy program has explored the effects of income on health intervention, precision health tools, community care implementation,

caregiver and family support, and the utilization of support and resources by affected populations and individuals.

Over the next three years, the Health Policy program will expand its current focus to include research on the policy implications of aging, issues associated with the organization and financing of health care, notably in areas such as pharmaceutical policy, and work to identify the opportunities for governments to improve health outcomes with greater investments in the social determinants of health. Health expenditures dominate government budgets and health initiatives impact every Canadian depending on income, age, and health. The School is currently competing for a Canada Research Chair Tier II that will help anchor its research activities in the field of disability policy.

Integration of Research Programs

Having four distinct research divisions is an organizational advantage, and the wide variety of expertise and specializations within the School allows for interdisciplinary research so that policy issues can be analyzed and evaluated from a variety of perspectives. Encouraging more collaborative research across the divisions is a goal for the next three years and beyond.

For the School as a whole, communicating our expertise and the impact of our research, both internally and externally, could be improved. Using new media outlets, finding new audiences especially among younger audiences, and tapping into other policy networks would enhance our policy impact. Further integration of the research activities of the School with the MPP program and the executive training programs will also be a priority.

Fellows

In order to multiply our research expertise, the School has amassed a roster of Fellows who mentor students and deliver guest lectures to classes, write or review papers, speak to media on current issues, and provide advice and feedback to researchers and Program Directors. The wealth of experience that the Fellows bring to the School is unrivaled among our peers. The roster of Fellows consists of recognized policy experts from across business, government, and academia, providing cumulative expertise that is invaluable to the School.

**See Appendix E for a list of our Fellows*

Teaching and Training at the School of Public Policy

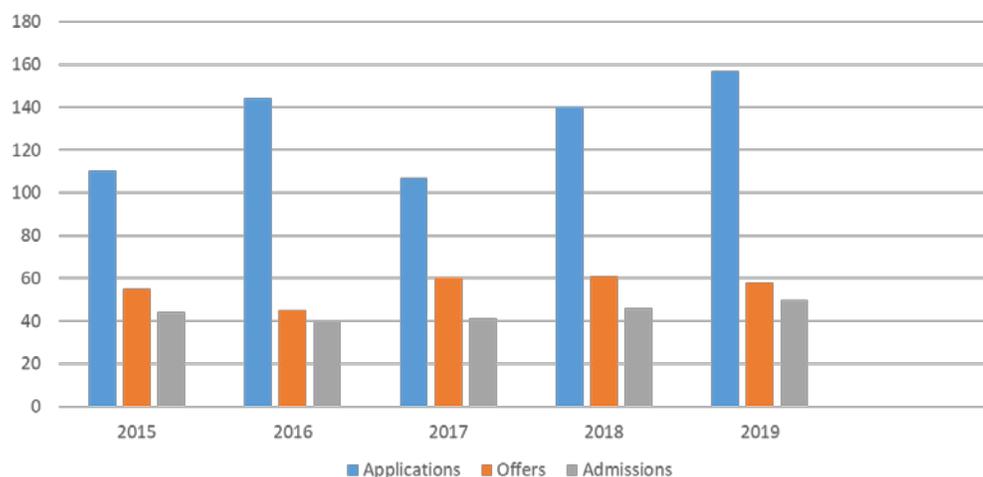
Master of Public Policy

The centrepiece of teaching and training at the School is the Master of Public Policy program (MPP). Established in 2011, our eighth cohort is now completing the program. The program is a one-year, course-based, professional Master’s program. Such programs are growing in popularity in Canada and elsewhere as students opt for graduate programs that are shorter in duration and designed to prepare them for an immediate career. The data contained in **Figure 1** show the attractiveness of the program. We received a record 157 applications from students across Canada and around the world for the 2019 class.

The hallmark of the program is our commitment to prepare students to immediately begin making a contribution to public policy upon graduation. The statistics on employment of our graduates demonstrate our success: over 90% of our graduates are employed in a policy-related role within six months of graduation. Our alumni now hold positions in all levels of government, private industry, and the public sector. See Appendix C for more information on the roles held by our most recent graduates.

In designing the program, the School looked to the curricula of leading programs in North America and Europe. Rather than a collection of courses from related disciplines, the MPP program is built around dedicated courses designed to give students a fundamental grounding in the skills needed to analyze and create innovative public policy. The students study together, all taking the same six core curriculum courses, supplemented by several courses in an area of specialization. In their capstone project, which completes the program, they have the opportunity to dig into a topic of special interest and propose new solutions to key public policy challenges.

Figure 1: MPP Applications, Offers, Admissions, 2015-2019



As we welcome our ninth cohort, the School is committed to conducting a full review of the program. With new programs developing world-wide, we want to ensure our program remains at the cutting edge and is responsive to new trends in the policy world. The review, drawing on external experts, will be completed this year with changes implemented as soon as possible.

Box 6: MPP and Alumni Statistics

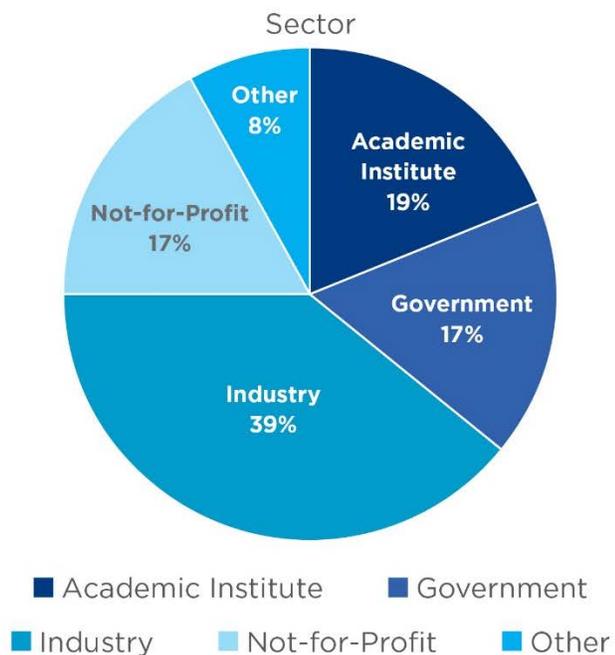
374
STUDENTS ADMITTED

265+
GRADUATES

9
COHORTS OF MASTER OF
PUBLIC POLICY STUDENTS

1,258
APPLICATIONS

2018 ALUMNI JOBS DATA



**See Appendix C for more info on our 2018 alumni*

MSc in Sustainable Energy Development

The new academic year, 2019–2020, will see the arrival of a new graduate program at the School: the very successful Master of Science in Sustainable Energy Development (SEDV). The program provides students with a graduate-level understanding of the science and policy aspects of sustainable energy. The program is truly interdisciplinary and involves the active participation of the Haskayne School of Business, the Schulich School of Engineering, the Faculty of Law, and the newly renamed Faculty of Architecture, Planning and Landscape. Haskayne has been the host faculty until recently, but with their launch of a number of new

graduate programs, it was decided that the School was better placed to support the SEDV program.

Like our MPP program, SEDV is a course-based Master's program designed to prepare students for immediate employment. Approximately 30 students complete the program each year. It will be a natural complement for the work done in the field of energy and environmental policy at the School as well as with the work of the Extractive Resource Governance Program. We expect over time that students from each program will take courses in the other and that all faculty at the School will work with SEDV students. Faculty currently involved with SEDV will be invited to collaborate on the energy-related work conducted at the School.

Extractive Resource Governance Program

Our Extractive Resource Governance Program (ERGP) offers to an international clientele training and capacity-building programs tailored to the specific needs and timelines of each client's country. These programs provide objective advice, based on Canadian and international best practices, to educate officials involved with developing resource sectors. Over the next several years, ERGP is focused on increasing the client-base from countries with newly emerging resource development sectors and expanding into the mining sector while maintaining expertise in the oil and gas sector. ERGP offers the following educational programs:

Extractive Resource Governance Executive Certificate

This is a non-academic certificate for extractive resource legislators, regulators, and policy professionals. The certificate includes three modules grounded in international best practices: Fiscal Governance, Regulation of Oil and Gas Development, and Public Engagement and Community Consultation. The certificate is delivered in-country and customized to address the specific challenges and opportunities a country faces.

Customized Workshops (ERGP)

ERGP provides specifically tailored workshops and seminars to focus on key areas of interest to help clients build and develop their skills in predetermined areas.

Online Seminars (ERGP)

ERGP delivers customized, short, online training seminars that either support a larger program or act as a stand-alone learning opportunity. Seminars can focus on any topic a client needs and are developed on a case-by-case basis. Seminars can range from general overviews to detailed and technical instruction.

Academic Policy Certificates

In the next three years, the School will work to establish academic-credit certificate programs in selected areas of public policy. The first two programs we seek to offer will be in the areas of

Health Policy and Energy Studies. In both cases, the goal will be to offer a program aimed at professionals working in these fields who are seeking to upgrade their academic knowledge. The programs will consist of four graduate-level courses, one of which will be an introduction to public policy, while the other three will focus on key policy issues in the specific field of study. The courses will be offered at a time and in a format that will allow interested students to combine their studies with full-time work. The School will look to partner with other faculties on campus, where appropriate. In the case of Health Policy, for example, we will work with the Department of Community Health Sciences and the O'Brien Institute for Public Health to create a program that will appeal to a range of professionals in the health care field. The credits earned by the students may be applied towards a Master of Public Policy degree, should they decide to pursue the full degree.

Part-Time MPP Stream

Related to the above plans to develop academic-credit certificate programs in selected areas, the School aspires to offer a formal part-time stream for the MPP program. The ability to provide this option to future students is largely dependent on resources and logistics, but it is believed to be a valuable option for many working professionals who may be interested in pursuing policy education.

Juris Doctor/Master of Public Policy

The Juris Doctor/Master of Public Policy (JD/MPP) combines the study of law and public policy across the spectrum of dynamic issues where law and public policy intersect, including resources and the environment, economic and social issues, international policy, taxation, regulation and public finance. Offered in partnership by the Faculty of Law and the School, this 3.5 year program is targeted at students who are interested in developing their legal skills and their ability to understand, analyze, develop, and implement public policy.

Master of Business Administration/Master of Public Policy

The School of Public Policy and the Haskayne School of Business offer Canada's first joint Master of Business Administration/Master of Public Policy (MBA/MPP) program. This joint-degree program provides students with an even broader range of skills that are highly valued in the private and public sectors. The combined 2.5 year program positions students to be successful in roles at the interface of government and industry, such as corporate social responsibility officers, within regulatory bodies, and entrepreneurship in the not-for-profit sector.

Doctor of Public Policy

In the original vision of the School, a doctoral program was included as a medium-term goal; however, in the first few years the School's executive decided that it was best to first focus on fully developing the MPP program before undertaking a doctoral program. At a program-development retreat in January 2019, faculty unanimously encouraged the introduction of a doctoral program in the medium-term future. A Doctor of Public Policy (DPPol) program would be designed for students who have completed the MPP or an equivalent program and are seeking a leadership role in public policy. Such a program would also attract working policy professionals and former politicians from around the world who are looking to deepen and refresh their policy analysis and development skills. A doctoral program is the natural addition to the very successful MPP program. Offering a full range of graduate programs would also raise the stature of the School within the University and in the larger policy education sphere.

International Activity

The original vision of the School was one of global reach and presence. Understandably, it was first necessary to establish the School within Calgary and Alberta. The School has now returned to this original concept, rapidly increasing its international presence with precise targets and partnerships. It is well understood that it is impossible to be Canada’s leading policy school if we do not have a strong international presence and global reach. The School’s emphasis on international partnerships helps us recruit the best and brightest students from Canada and abroad and to develop collaborations with experts from around the world. Further, these partnerships allow us to benchmark our programs and research against the best policy schools and analysts.

In the last three years, significant progress has been made. A dedicated secretariat has been established within the School’s Community and Strategic Engagement Division and tasked with the oversight, coordination, and development of the School’s international activities.

The School’s established international commitments were initiated at the request of particular donors (e.g.: Germany, Israel) or as the result of business development initiatives (e.g.: Mexico). While still dependent on external contributions and contracts, new initiatives follow from a concerted plan to develop the School’s research capacity in strategic areas — such as trade or energy policy — and increase its visibility.

The School’s Current International Portfolio

Atlantik-Brücke

The School has a strong relationship with Germany through the Atlantik-Brücke initiative. Atlantik-Brücke is an organization that has been at the forefront of efforts to deepen economic and policy cooperation between Germany and Canada for decades. Its annual German-Canadian conference is an intimate, invite-only gathering of leaders, decision-makers and policy experts. What began as a small-scale activity in an established arrangement between Canada and Germany has evolved into an active, engaged partnership with multiple avenues of collaboration. The School now hosts the secretariat of Atlantik-Brücke Canada and oversees all the organization’s activities, including transatlantic conferences. This partnership speaks to the heart of the School’s mandate to connect the private, public, and academic worlds.

Atlantik-Brücke, in partnership with the School, has recently integrated a stand-alone program for young Germans and Canadians interested in furthering our transatlantic relationship. The **German-Canadian New Bridges Program** intends to facilitate the “next generation” of German-Canadian partnerships in business, government, academia, and the arts. The group participated in an in-depth, week-long exchange on current and future challenges on both sides of the Atlantic, with the aim to foster greater understanding of the German-Canadian relationship

among the younger generations and to provide them an opportunity to make lasting transatlantic connections. The New Bridges program is produced in partnership with the Embassy of the Federal Republic of Germany in Canada and the Embassy of Canada in Berlin.

German Economic Institute

The School has newly established a collaborative relationship with the German Economic Institute, a leading European policy think tank and research institute located in Cologne. The goal of this initiative is to pursue joint research projects that address the policy needs of both countries. A first event took place in June 2019 and consisted of experts from Germany and North America engaging in a joint German-Canadian Dialogue on Health Policy. The objective of the event was to make differences in the respective health systems transparent, to understand scientific approaches from the respective national points of view, and to determine possibilities for mutual learning and future research collaboration.

Goodenough College

In 2018, the School joined with Goodenough College in London, UK, to host a policy symposium exploring the significant relationship between Canada and the UK, with an Albertan perspective. *Shoulder to Shoulder: Forging a New Canada-UK Relationship* focused on three key themes central to the current climate: The Future of Trade and Investment, The Future of Financial Markets, and The Future of Security Cooperation. The School partnered with the Faculty of Law at the University of Calgary for this event, which was further supported by the British Consulate-General in Calgary. The event featured expert panels of public and private sector representatives for focused, frank and real-world debate on practical policy routes to strengthening the Canada-UK relationship. The School will continue this relationship with Goodenough College, holding the second event in 2019. We have taken steps to become the “prairie hub” for the large Goodenough alumni community in Canada, as part of a long-term partnership agreement.

Extractive Resource Governance Program

The School’s Extractive Resource Governance Program (ERGP) assists decision-makers in developing countries and emerging economies with policy and regulatory best practices to responsibly unlock and manage endowments of hydrocarbon and mineral resources. The vision of the ERGP is to contribute to better policy outcomes through applied, evidence-based research and analysis in extractive resource governance, to be a trusted resource for policymakers and regulators on best policy and practice in extractive resource governance, and to assist with responsible management of hydrocarbon and mining resources. Countries currently involved with ERGP include Mexico, Mongolia, Columbia, Brazil, Kenya, Mauritania, Azerbaijan, Pakistan, Senegal, and South Africa.

In 2017, the School was awarded two of four Knowledge Networks by the Mexican Energy Secretary to collaborate on research related to resiliency in oil and product midstream and downstream transportation systems, the development of a labor demand/supply model for the Mexican oil and natural gas sector, and the advancement of Mexico's service and supply chain for the oil and gas industry. Included in this project is funding for a number of students from Mexico to enroll in the MPP program. We expect our first Mexican students in the 2019–2020 academic year.

Multi-Faces of Israel

The Multi-Faces of Israel program is an elective course for MPP students. It was established in collaboration with the Centre for Israel and Jewish Affairs, based in Toronto. The goal of the program is for students to develop a comparative policy perspective between Canada and Israel. Israel is a country that has produced innovative policies and is an ideal jurisdiction to visit in order to experience the policy process.

The program includes a week-long trip to Israel to learn about policy development and application in a non-Canadian setting. Participating students attend several preparatory classes leading up to the trip; once in Israel, students hear lectures from a number of distinguished academics and policy-makers on critical and timely topics such as national security, environmental policy, settlements and Israeli law, and human rights. Several Israeli students are invited to participate in a number of activities with the group, fostering international relationships and peer-to-peer learning opportunities.

The Multi-Faces of Israel program is increasingly popular with students and has been opened up to MBA students from the Haskayne School of Business.

As part of the original gift that helped establish the Multi-Faces of Israel program, a scholarship exists to fund one Israeli student in the MPP program every year. This further strengthens the relationship between the School and Israel and enriches the MPP student experience.

Western Economic Diversification

In 2012, the School (primarily through the International Policy and Trade research division) and Western Economic Diversification (WED) entered into a ten-year partnership to deliver a series of outreach events, research publications, and networking objectives. The funding model is a 50% match on completed activities. The School organizes events or publishes research that advances Canada's trade policy objectives; identifies new market diversification opportunities; and advances Canada's defence or foreign policy objectives. The School secures half of the necessary funding to support these activities and WED matches the other 50% of the costs of the events and papers, including some salary recovery for the people working on these initiatives.

Canadian Global Affairs Institute

In 2012, resulting from a successful development initiative, the Canadian Global Affairs Institute (CGAI) and the School entered into an agreement to produce a series of joint outreach activities and research papers on trade and security as a way of honouring commitments made to a generous donor who is passionate about Canadian foreign and security policy. The School leverages its unique academic setting to access the vast roster of Fellows associated with the CGAI, as well as the CGAI's network and presence in Ottawa. In return, the CGAI benefits from access to our expertise in publishing peer-reviewed studies, and to our professional Events and Communications teams.

New and Ongoing International Targets

A number of countries and cities have been identified by the School and its stakeholders as ideal partners that would help foster the School's international growth and development. Three regions have been identified for development in the near-term:

Asia – The School has been approached by the UCalgary International team to explore new research and academic partnerships with **Singapore** in fields such as health and energy policy. As the result of initial conversations, the National University of Singapore's Energy Studies Institute recently expressed an interest in developing joint research projects with the School's Energy and Environmental Policy research division.

Europe – Beyond our solid relationship with Germany, **Brussels** has been acknowledged as the model location for a future European event led by the School and involving other policy schools in Canada. The event would showcase Canadian expertise in fields in which our policy knowledge and experience are unique and original. This event would further establish the School as Canada's leading policy school to both Canadian and international participants.

North America – In addition to our established partnerships within Mexico, the School seeks to re-engage with organizations and institutions in the **USA**. A series of policy seminars that look closely at specific Canadian and American policy fields to assess similarities and opportunities for collaboration would be very timely and of value to stakeholders.

Box 7: The School's Successes

MOST CITED

policy school by Canadian academics.

MOST CITED

policy school in Canada by media.

500+

events, both national and international.

\$65 MILLION +

raised in philanthropic and grant funding for research, scholarships, outreach and student experience.

25,000

attendees at national and international conferences and symposia.

75+

Fellows who bring an unprecedented and unmatched depth and range of policy knowledge to bear on research and public discourse.

8

cohorts of remarkably trained Master of Public Policy graduates with 95% practicing in their chosen field.

425+

peer-reviewed research publications.

Sustainability & Funding

Background

The School of Public Policy was launched in 2009 with an original commitment of \$1 million annually from the University of Calgary and the full support of the James S. and Barbara A. Palmer Chair in Public Policy. Approximately 30–35% of the School’s annual funding is currently provided by the University as a base funding envelope. The Master of Public Policy (MPP) program was designed as a cost-recovery program, with scholarships and entrance awards largely funded by donors and granting agencies. Since inception, the School has generated the remainder of its budget via philanthropic fundraising, grants, and contracts to maintain and enhance the School’s key research and teaching pillars. In the School’s tenth year, the annual consolidated budget is projected at \$9.8 million, with a fundraising target in the order of \$2 million annually.

Keeping the Budget Balanced

The size and scope of the School’s operations have always been dependent upon its ability to secure external funding, which has resulted in the adoption of a prudent approach to managing resources. Over the years, the School has been able to achieve a balanced consolidated budget while enhancing the learning experience and maintaining high quality and impactful research publications by:

- Sharing academic and administrative resources among the research divisions and support units.
- Adopting a three-year consolidated financial planning cycle.
- Implementing annual zero-based budgeting cycles for research programs.
- Controlling outreach event costs.
- Ensuring Scientific Directors are accountable for their budgets and the programming outputs of their research divisions.

Development

The School of Public Policy has a Development team of three, including the Director, Associate Director and a Donor Relations Advisor. They are responsible for raising major gifts of \$25K and above to support the school, with a current annual goal of \$2M.

Strategic Priorities

While the School is currently celebrating the success of two very significant research contracts from the Alberta and BC governments, we are cognizant of the need to mitigate the current economic realities by diversifying our donor base and funding sources. Over the next three years, local and global economic uncertainties combined with a very competitive fundraising

environment may affect the School's fundraising activities. While posing some risk, this also provides the incentive to aggressively pursue diversification amongst our funding sources, with new donors and sectors of industry or government targeted. This, in turn, impacts what we do and how we do it, with multiple opportunities at hand to pursue.

The strategic direction for sustainable funding for the next three years includes a heightened focus on UCalgary base budget funding, philanthropic gifts, grants, and contracts.

Base Budget Funding From University of Calgary

The size and scope of the School has been growing steadily, requiring frequent budget adjustments to maintain a balanced, consolidated operating budget that reflects its secured cash flows. To ensure long-term financial stability and sustainability, the School requires base operating funding from the University to represent 40% of its consolidated operating costs. This objective has been acknowledged by UCalgary leadership and is progressively achieved over the course of the new Strategic Outlook.

Philanthropic Gifts

The School continues to look for a generous donor to name the School. A principal gift of this magnitude would allow the School the stability and flexibility it needs. We continue to diversify our external funding sources by searching for new donors for key established research areas including Fiscal and Economic Policy, Energy and Environmental Policy, and the Canadian Northern Corridor project; simultaneously, new and emerging areas such as pharmaceutical policy, policies affecting vulnerable populations, and urban policy.

As a policy school located in the petroleum heartland of Alberta, our major donors have been impacted by volatility in global oil prices. Many energy companies have reduced their budgets for philanthropic gifts. With this long-standing corporate support challenged by economic forces, the School plans to develop a strong focus on philanthropic giving with individuals and families in our community who have deep connections to public policy. Collaboration with various faculties across campus will also be key. The School will expand its prospect and donor reach by engaging in pan-university projects that have public policy outcomes as a critical driver.

Sponsorships form part of our fundraising activities at the School. In an effort to maximize efficiency and create sustainability, the School is actively soliciting multi-year sponsors for our flagship Distinguished Policy Fellow Awards Dinner, as well as sponsors for the Current Affairs Series and Policy and a Pint community engagement events. These events engage both current and prospective donors and help to build our pipeline of future support. The School is working with companies in both Canada and the UK to obtain sponsorships for our annual Shoulder-to-Shoulder symposium at Goodenough College. Continued pursuit of national and international partnerships will serve to grow our prospect pool and increase the profile and impact of the

School on the world stage. Over the next three years, the School plans to amplify our Legacy and Tribute Giving program. We hosted the first Legacy Breakfast in 2019 at which current and prospective donors were introduced to the concept of continuing their philanthropic impact through legacy giving.

Although the School is quite young, with alumni who are relatively new in their careers, it is important to increase our engagement with them now. Working with the University's central Alumni Engagement team, the School will continue to host Alumni Weekend activities each year and will continue with its successful Alumni newsletter and affinity program.

Grants

The School will heighten its focus on grant applications in order to successfully secure funding for a variety of research projects and activities. In an effort to increase the number of top-quality applications submitted, — with a high likelihood of success — Development will work closely with researchers, faculty, and members of the Research Services Office at the University. A new Research Management System has recently launched for all UCalgary researchers, which will streamline, track, and measure grant applications and awards, providing valuable metrics and guidance for future competitions. With the impending end of the Western Economic Diversification grant in two years, the School will soon seek consultation with the federal government regarding a continuation or renewal of this grant.

Contracts

Building on the recent achievement of three significant research contracts with international and provincial governments — two Knowledge Networks negotiated with the Mexican Energy Secretary, the BC Basic Income project, and the Canadian Northern Corridor project (funded by Alberta) — the School will strategically seek out similar contract relationships to advance its research activities. Such contracts can be essential funding mechanisms for existing projects, or can allow the creation of nimble, fixed-term programs.

Operational Efficiencies

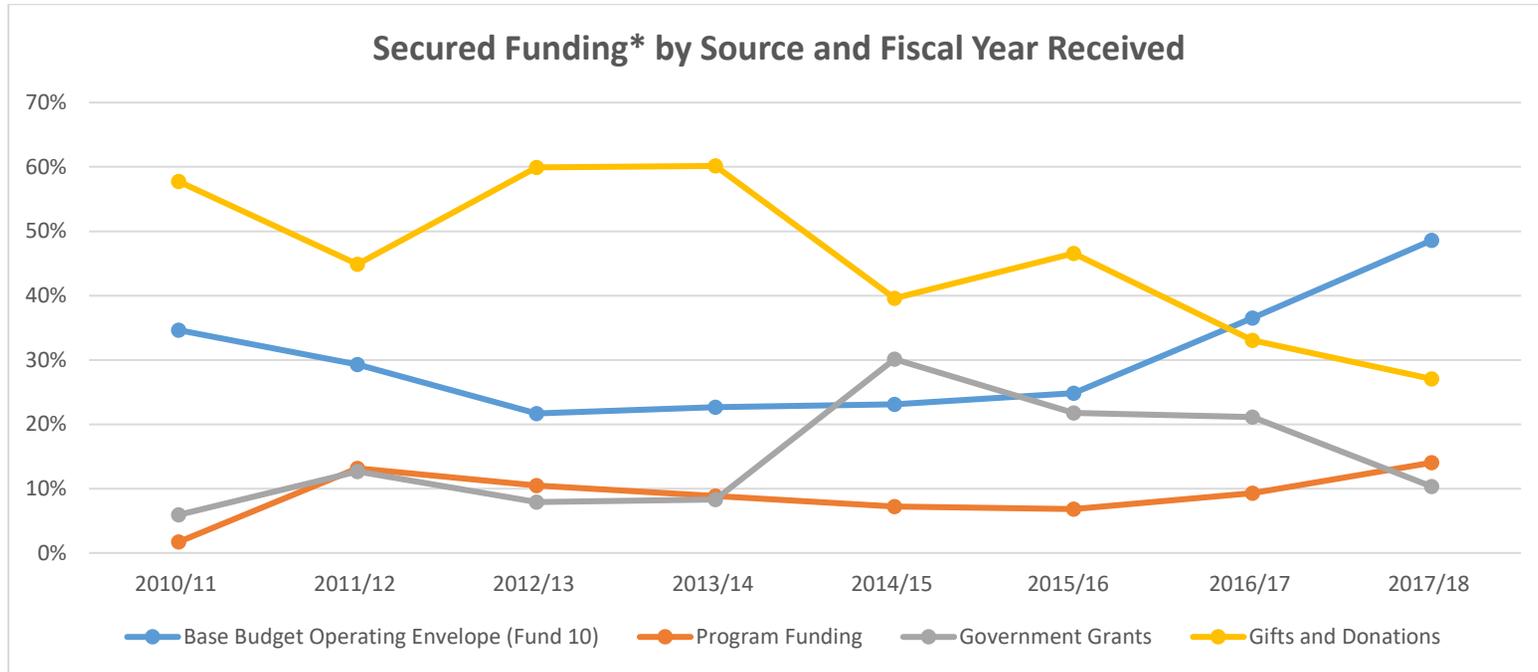
The School will maintain a structure that emphasizes growing cooperation among the research divisions and stay focused on key priorities. We will continue to share academic and administrative resources among the research divisions and seek funding for postdoctoral researchers to complement academic staff. We will continue to collaborate on pan-university fundraising initiatives that will benefit the School and proactively engage on-campus support units such as Alumni Engagement, Strategic Communications and Events, and Government Relations to amplify the work of the School's Development team.

New Programs

In addition to the new graduate program, the School will continue to seek opportunities intended to generate additional revenue. Executive training programs, additional certificate or diploma programs, workshops, conferences, and seminars will serve to attract additional sources of revenue.

School of Public Policy Strategic Outlook 2019–2022

Revenue by Source (\$)	2010/11 Actual	2011/12 Actual	2012/13 Actual	2013/14 Actual	2014/15 Actual	2015/16 Actual	2016/17 Actual	2017/18 Actual	2018/19 Actual	2019/20 Forecast
Base Budget Operating Envelope (UofC Funding)	1,159,000	1,372,000	1,482,000	1,638,000	2,267,000	2,344,000	3,225,000	3,055,000	2,995,000	3,047,000
Program Funding	57,000	616,000	716,000	640,000	707,000	644,000	820,000	882,000	974,000	1,322,000
Government Grants	198,000	593,000	542,000	600,000	2,954,000	2,055,000	1,867,000	650,000	2,969,000	3,582,000
Gifts and Donations	1,932,000	2,101,000	4,094,000	4,344,000	3,880,000	4,398,000	2,920,000	1,701,000	1,446,000	2,000,000
Funds Received	\$3,346,000	\$4,682,000	\$6,834,000	\$7,222,000	\$9,808,000	\$9,441,000	\$8,832,000	\$6,288,000	\$8,384,000	\$9,795,000



* Secured Funding - indicates all recorded revenues that the School has received in each of the fiscal years

Conclusion

The Strategic Outlook presented here is meant as a guiding document, and not an inflexible mandate. We will revisit the Outlook often and measure our successes. When necessary, we will analyze our endeavours and adjust accordingly, based on the Outlook’s strategic goals and achievement measures. Annual reviews of the goals will be conducted to ensure we are on the correct path to meet our targets; a review in year two will coincide with the planning for the next strategic plan and a robust evaluation of achievement measures and remaining strategic goals will be undertaken.

The Outlook lays out a path of excellence, originally devised by the founders, whether it is to conduct independent research and offer advice in specific areas of expertise, or to develop real world policy skills in the students registered in our programs. The Outlook will be used to assess resource distribution when considering new initiatives and projects, ensuring our efforts are compatible with our goals, both in the short-term and farther into the future.

We remain committed to our original goal of being Canada’s leading policy school and one of the best policy schools globally. The overall vision of the School’s origins remains intact — to grow the School of Public Policy’s reputation nationally and internationally and make it sustainable, while preserving its unique character — *pragmatic, impactful, audacious, independent.*

Appendix A: Mission, Vision, Values

As the tenth anniversary of the School of Public Policy approached, it became necessary to examine our past and to chart a way forward, ensuring continued success and influence in the global policy sphere. With the arrival of Dr. Pierre-Gerlier Forest as Director, the School updated its governance structure as well as its Vision, Mission and Values, to ensure that the entire School community was aligned on the same path and working towards the same goals at an institutional level.

Mission

The School was founded in 2008 by renowned economist Jack Mintz with a vision to drive policy discourse through relevant research, outreach, and teaching. Its faculty is composed of scholars with exceptional academic credentials and experienced practitioners in business, government, and the non-profit sector.

The School's research is respected because it is independent, credible, and based on hard data. Its influence is reflected by its wide dissemination among policy-makers, business leaders, and the media. Indeed, the School is Canada's most cited policy school, both within traditional media and academic publications.

The School of Public Policy also provides hands-on training in Canada and abroad through a Master of Public Policy Program, an Extractive Resource Governance Program, and Executive Training Programs. With the beginning of the 2019–2020 academic year, the School will welcome the established Master of Science in Sustainable Energy Development (SEDV) program, currently housed at the Haskayne School of Business. Alumni from our programs can be found in leadership positions in the private, public and non-profit sectors across Canada, and we are determined to continue to build on this success.

What we do:

- Advance practical and focused policy research
- Shape public policy by driving meaningful debates
- Develop Canada's future policy leaders

Vision

To be Canada's Leading Policy School

Values

Over a year-long process, a School-representative Values Committee first worked to establish an Internal Values Statement that outlines the way we operate at the School. From this statement, individual words and definitions were selected that best support the statement and

reflect the values held by staff and faculty. The statement and words were workshopped with the entire School at several special Town Halls to encourage feedback and engagement with the process from an early stage.

The internal values statement that resulted from this exercise is: *We are a group of respectful professionals with a can-do spirit whose individual motivations always show a broader concern for the School, our colleagues, and the impact of our work.* From this statement and the broader consultations, the following words and definitions were selected to best describe the School's community and the work done:

- **Independence** — Freedom to think boldly
- **Drive** — Getting things done
- **Impact** — Solving real-world problems
- **Concern** — Furthering the common good
- **Respect** — Holding ourselves to the highest standards

The School of Public Policy in Ten Years

What will the School of Public Policy look like on its 20th anniversary in 2029? During its first ten years, the School grew to become the leading school of its sort in Canada, due to the rigour and relevance of its research and the quality of its MPP program. Many of the elements required to reach the next level and achieve global recognition in our signature areas of expertise are already present. We have developed unique research approaches based on data analytics and interdisciplinary work. We have focused our attention on crucial policy problems such as those seen in tax policy and public finances, energy and the environment, the vast field of social policy, or in international trade and security. We have attracted a diverse group of faculty members and research staff, well trained and policy savvy. Our graduates bring their analytical skills and broad policy culture to the hundreds of public and private organizations that have hired them.

To be an internationally leading centre for policy research and policy training, we must continue to focus on issues not only affecting us here in Calgary and Alberta, but those that threaten our way of life from across the country and the globe. We must continue to rely on fact-based analysis, in our research and in our teaching. We must remain true to our roots and ensure that we are flexible, thorough, and impactful. Yet we must also make sure our means match our ambitions. The School should therefore increase its capacity and grow the size of its dedicated faculty to meet the rising demand for sound and timely policy advice, coming from all sectors of society, as well as the need expressed for a broader range of training programs, from aspiring doctoral candidates to practitioners seeking new or additional training. Without abandoning an original funding model that so clearly incentivizes innovation and fosters intellectual

independence, the School must achieve a level of sustainability that facilitates long term projects. Finally, the School should look for a structure that better reflects its academic standing and can react swiftly and strategically to changes in the environment.

Appendix B: Strategic Themes

As we began the extensive process of developing the new Strategic Outlook for the School, we developed a series of strategic themes that would be presented to all stakeholders and participants at every opportunity. These themes facilitated discussion and directed focus to the primary aspects of the School's functions. Although this new Strategic Outlook will cover the period 2019–2022, it is important to note that the strategic planning exercises have asked participants to envision the long-term future of the School, stretching to ten years and beyond. The strategic themes, as outlined below, serve to ground the future of the School in its roots, staying true to the original vision.

1. **Programs** - The MPP reputation is outstanding, especially because of its original integrated structure (vs. a patchwork of courses drawn from existing programs) and its success in preparing graduates for a competitive job market. Yet the program has not evolved much since its inception and its content is not necessarily reflective of the evolution of the policy sciences or of the changing interests of the students. If the School is to continue to compare itself favorably to the other schools of the sector, it would also consider offering a broader range of programs, beyond the MPP.
2. **Sustainability** - The School has been quite successful in raising money from the corporate sector in support of its research platforms, especially in areas such as energy and financial services. But this has proved to be a double-edged sword, as it has made the School dependent on a small number of donors with very focused interests and a particular optic. A better funding model would help support a broad spectrum of policy research (i.e. beyond energy and tax policy) and reflect a wider variety of social and economic interests.
3. **Impact** - Until now, impact has been defined (and measured) nearly exclusively as the attention received in the media by the School's publications, compared to the media reach of other Canadian policy research organizations such as think tanks or academic policy research institutes. Anecdotal evidence exists of the School's influence on policy decisions in a wide range of public or private organizations, but we never seriously attempted to assess policy impact in this way.

Appendix C: Alumni Jobs Data, 2018 Graduating Class

Job Titles:

- Analyst
- Student Assistant
- APS Policy Intern
- Policy Researcher
- Policy Analyst
- Policy and Markets Analyst
- Research Analyst
- Client Services Coordinator
- Regulatory Analyst
- Surgery Fellow
- Underwriting Assistant
- Project Engineer
- Director of Operations
- Research Associate
- Occupational Therapist
- Intern
- Research Assistant
- Associate, Regulatory & Government Affairs
- Junior Analyst
- Consultant
- Outreach Coordinator
- Researcher
- Post-Graduate Research Scholar
- Graduate Trainee
- Team Lead - Outreach Services
- Program Manager
- FTR Congestion Trader
- Supply Management Professional
- Atlantic Director
- Translation Research Support
- Research and Policy Officer
- Manager Regulatory & Stakeholder Relations

Employers:

- Chymko Consulting
- CLD Rockies, University of Calgary Program
- Public Service Commission, Government of Alberta
- The Fraser Institute
- The Alberta Wheat and Barley Commission
- Universities Canada
- Money Mentors
- Calgary Homeless Foundation
- PSD Research Consulting Software
- Alberta Gaming and Liquor Commission
- Canadian Pacific Railway
- Intact
- TransCanada
- Alberta Institute - Public Policy Think Tank
- Alberta Health Services
- Navigator Ltd. - Public Strategy & Communications
- Woods Homes
- NxGen Navigators - Public Policy Consulting Firm
- Royal Bank of Canada
- Communica - Consulting Firm
- Hill & Knowlton Strategies
- United Conservative Party Caucus
- School of Public Policy, University of Calgary
- Asia Pacific Foundation of Canada
- DHL Supply Chain, Service Logistics EMEA
- Calgary Seniors Resource Society
- Government of Alberta
- Energy Efficient Alberta
- Canadian Natural Resources Limited
- Canadian Tax Payers Federation
- Real Estate Council of Alberta
- Vopak

Appendix D: Our Experts

DISTINGUISHED POLICY FELLOWS

Thomas d’Aquino

Distinguished Policy Fellow

The Rt. Hon. Stephen Harper, P.C.

Distinguished Policy Fellow

Tom Jenkins, O.C.

Distinguished Policy Fellow

Nancy Southern

Distinguished Policy Fellow

FACULTY MEMBERS

Eugene Beaulieu

International trade

David Bercuson, O.C.

Military policy and national defence

Bev Dahlby

Tax policy and fiscal federalism

Pierre-Gerlier Forest

Health reform and federalism

Ron Kneebone

Fiscal and social policy

Myles Leslie

Health quality and senior care

Kevin McQuillan

Population change

Jack Mintz, C.M.

Tax policy

Norma Nielson

Financial markets policy

Jean-Sébastien Rioux

International conflict and foreign policy

Lindsay Tedds

Tax and economic policy

Bryce Tingle

Corporate finance and corporate governance

Jennifer Winter

Energy and environmental policy

Jennifer Zwicker

Economics of health interventions

EXECUTIVE FELLOWS

Uzi Arad

National security and defence policy

Deborah Archibald

Community engagement and resource development policy

Matt Ayres

Energy and environmental policy

Leonardo Beltran

Extractive resource governance

Vivian Bercovici

Foreign policy and business

Brian Bietz

Energy and environmental policy

John Carruthers

Energy and Indigenous partnerships

Laura Dawson

Economic policy and
U.S.-Canada relations

Jim Dilay

Resource extraction policy

Wendy Dobson

International policy, trade and finance

Serge Dupont

Natural resources and international finance

Robert Fonberg

Trade, security and cyber-issues

Matthew Foss

Energy policy, taxation and economics

Peggy Garritty

Tax and economic growth

Robert Hage

Foreign affairs and international trade

Ron Hallman

Environmental assessment

Eddy Isaacs

Energy and environmental technologies

Sheila Leggett

Extractive resource governance

John Lester

Tax, innovation and entrepreneurship

Brian Livingston

Energy policy and law

Janice MacKinnon

Fiscal policy and federal-provincial relations

Robert Mansell

Resource economics and regional policy

Richard Masson

Energy project development

Dan McFadyen

Extractive resource governance

Margaret Melhorn

Fiscal and economic policy

Ted Morton

Politics and energy policy

Marcia Nelson

Social policy, health, tax and economic growth

Paul Precht

Petroleum fiscal structures and resource governance

Colin Robertson

International relations and defence, security and trade

Nobina Robinson

Innovation, higher education and skills policies

Lawrie Savage

Financial regulation, insurance and risk management

Colum Smith

Health networks and cancer policy

Hugh Stephens

International trade and Canada-Asia relations

Andrei Sulzenko

National infrastructure and trade policy

Almos Tassonyi

Municipal and urban policy

Ron Wallace

Tax and economic growth

Scott Wilkie

International taxation and tax treaties

RESEARCH FELLOWS

Paul Boothe

Economic and environmental policy

Brendan Boyd

Energy and Environmental policy

James Coleman

Energy, trade and transport policy

Brian Conger

Tax and economic growth

Dan Dutton

Social data and policy

Herbert Emery

Regional economics

Ergete Ferede

Tax policy and fiscal federalism

Carol McAusland

International environmental economics

Kenneth McKenzie

Energy, taxation and fiscal policy

Katrina Milaney

Social and economic policy

Michal Moore

Resource and energy economics

Lucija Muehlenbachs

Water, resource and energy policy

Martin Olszynski

Environmental law

Norma Padron

Data analytics and AI

Maya Papineau

Economics of climate change

Nicholas Rivers

Environmental and renewable energy policy

Blake Shaffer

Energy and environmental policy

Wayne Simpson

Labour and urban policy

Robert Skinner

History and geopolitics of energy policy

Fenner Stewart

Energy law and federalism

Leah Stokes

Energy and environmental policy

Trevor Tombe

Trade and economic policy

Andre Turcotte

Public opinion research and communications

Alina Turner

Homelessness and affordable housing

Harrie Vredenburg

Energy and environmental policy

Lana Wells

Social policy and violence prevention

Jean-François Wen

Taxation and social insurance

Tom Wilson

Forecasting, fiscal and tax policy

Joel Wood

Environmental economics

RESEARCH ASSOCIATES

Philip Bazel

Fiscal and social policy

Patrick Berrigan

Health economics

Zak Biggs

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Daria Crisan

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Sarah Dobson

Resource taxation frameworks

Stephanie Dunn

Disability and social policy

Kent Fellows

Energy and regulatory policy

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Disability policy

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Krystle Wittevrongel

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