AGENDA
Budget Committee
May 2009 National General Meeting

DAY ONE

1. PREPARATION FOR COMMITTEE DELIBERATIONS

a. Ratification of the Committee Chair(s)

Standing Resolution 1, Section 4, *Committee Chairperson,* states that as its first order of business each standing general meeting committee shall either: ratify as the committee chairperson(s) the National Executive member(s) appointed to the committee; or elect a committee chairperson from within its membership.

The National Executive is recommending that National Treasurer Dave Molenhuis be ratified as chair for the Committee.

b. Roundtable Introductions

c. Review of the Committee Agenda

d. Review of the Committee's Terms of Reference

Committee members should be familiar with the responsibilities of the Budget Committee as established in the Federation's Standing Resolutions. Standing Resolution 1, Section 3.a) *Budget Committee,* states that at the spring general meeting the Committee shall:

- develop a draft budget for the upcoming fiscal year for submission to the closing plenary of the semi-annual general meeting;
- assess the availability of funds for proposed projects and/or purchases, including donations; and
- discuss the Federation's long-term financial planning.

2. REVIEW OF FINANCIAL DOCUMENTS AND ISSUES

a. Orientation to the Finances of the Federation
i. Revenue Sources
ii. Areas of Spending
iii. Funds and Fund Balances

b. Presentation of 2007-08 Audited Financial Statements

c. Overview of Current Financial Realities/Pressures (In-camera)

d. Review of 2008-09 Budget and Year-to-date Statements

The Committee will review the 2008-09 budget and the comparative year-to-date statement of revenue and expenditures.

DAY TWO

3. FINALISATION OF THE 2009-10 BUDGET

a. Presentation of Draft Budget

The first draft of 2009-10 Budget, drafted by the National Executive, was circulated four weeks in advance of the meeting. A revised draft with schedules will be presented at this time.

b. Consideration of Amendments

The Committee will consider amendments to the draft 2009-10 budget.

4. MOTIONS REFERRED FROM OPENING PLENARY

The following motion will likely be referred to the Budget Committee by the opening plenary.

2009/05:N12 MOTION

Be it resolved that McLarty and Company be retained as the Federations' auditor for the 2009-10 fiscal year.

5. DISCUSSION OF THE FEDERATION'S LONG-TERM FINANCIAL PLANNING

6. ADJOURNMENT

AGENDA
Campaigns and Government Relations Forum
May 2009 National General Meeting

DAY ONE

1. ROUNDTABLE INTRODUCTIONS AND CAMPAIGNS UPDATE

2. DEVELOPMENT OF THE NATIONAL CAMPAIGNS PLAN

a. Presentation of Draft 2009-10 Campaigns Strategy

The Campaigns Strategy forms the basis for the Federation's campaigns and government relations work for the year to follow. Each year, prior to the May national general meeting, the National Executive prepares a draft Campaigns Strategy for presentation to the general meeting for consideration.

A presentation about the issues addressed in the draft strategy will be provided.

DAY TWO

3. MOTIONS REFERRED FROM OPENING PLENARY

The following motions will likely be referred to the Campaigns and Government Relations Forum by the opening plenary:

2009/05:N03 **MOTION**
Local 1/

Whereas anti oppression training is an important tool to create awareness of the systems that are in our institutions and societies that guide the way many marginalised communities are forced to exist; and

Whereas anti-oppression training is important to take positive steps forward against institutionalised form of discrimination; and

Whereas the Canadian Federation of Students is dedicated to anti-oppression initiatives; and

Whereas systemic oppression continues to exist in our society and on our campuses; and

Whereas anti-oppression training is recommended to all community members, particularly those in leadership positions; therefore

Be it resolved that an anti-oppression education kit be developed and anti-oppression materials be provided for all member locals; and

Be it further resolved that an anti-oppression trainer contact information list be provided to all member locals.

2009/05:N04 **MOTION**
Local 5/

Be it resolved that an end to the cruel, inhumane and illegal blockade against Cuba be demanded; and

Be it further resolved that a letter be written to United States President Barack Obama demanding an end of the blockade of Cuba.

2009/05:N05 **MOTION**
Local 78/

Whereas the Federation supports the right of students to partake in the decision-making processes of governing bodies at post-secondary institutions; and

Whereas student representatives, elected by fellow students, may disagree with the decisions of other members of these bodies to engage in decisions that are ultimately harmful to the interests of students, and therefore, of their respective institutions; and

Whereas such decisions may include the increasing of tuition fees; and

Whereas an increasing number of institutions have operating policy ("Codes of Conduct") that strongly discourages or prohibits student representatives from publicly taking positions contrary to the decisions of these respective boards, as well as stipulations that disallow student representatives to speak to the media; and

Whereas student representatives who act contrary to these policies may face penalties, including expulsion from their respective governing bodies; and

Whereas administrative justifications such as adhering to corporate norms do not correspond with the need for public institutions to act in an open and transparent fashion, whereby the decisions of governing boards may be held into account, thereby permitting student representatives to register their dissent in public; therefore

Be it resolved that the Federation staunchly oppose operating policies of governing boards that do not permit student-elected student representatives to speak publically on decisions of governing boards that may be perceived as contrary to the interests of students and their respective institutions.

2009/05:N06 **MOTION**
Local 78/

Whereas the Canadian Federation of Students has carried out equity campaigns regarding barriers to post-secondary education for students with disabilities; and

Whereas many students with disabilities face a multitude of barriers on their campuses, both attitudinal and physical (or structural) in nature; and

Whereas greater awareness on our campuses of disability as a social construct is required to foster greater participation and inclusion of students with disabilities; therefore

Be it resolved that a "No Ableism!" campaign be devised to assist member locals in combating ableist actions on their campuses and beyond, with member locals provided the following materials, to be developed in consultation with the Students with Disabilities Constituency Group:

- A survey template of "best practices" for combating ableism on campuses, to be administered by member locals. The data of these surveys is to be compiled into a manual of best practices by the Students with Disabilities Constituency Group at a later date;
- A survey template of local disability advocacy groups to be administered by member locals. The data of these surveys will be provided to the Students with Disabilities Constituency Group to aid lobbying efforts as they relate to issues that impact students with disabilities; and
- A template to outline how to run student centered focus groups on ableism;

Be it further resolved that the findings of discussions and focus groups be reported back to the Students with Disabilities Constituency Group for overall evaluation of campaign steps taken thus far, and consideration of next steps in the development of the campaign over time.

2009/05:N07 **MOTION**
Local 24/

Whereas the Department of Indian and Northern Affairs is considering the removal of the Post-Secondary Student Support Program (PSSSP) from First Nations community management control to place it under the supervision of the Canada Student Loans Agency or another third party agency; and

Whereas the removal of the PSSSP from First Nations management would be another erosion of First Nations self governance; and

Whereas the federal government continues to ignore the under-funding of First Nations' postsecondary education, despite the findings of the report of its Standing Committee on Aboriginal

Affairs and Northern Development, published in February 2007 "No Higher Priority: Aboriginal Post-Secondary Education In Canada," which recommended that the government make funding to increase Aboriginal involvement in post-secondary education a priority; and

Whereas, between 2001 and 2006, more than 10,500 First Nations students did not have access to post-secondary education due to lack of funding; and

Whereas the report of the Standing Committee on Aboriginal Affairs and Northern Development also mentions an unsteady and inadequate funding which jeopardises the future of First Nations post-secondary institutions; and

Whereas the Department of Indian and Northern Affairs continues to deny the fiduciary responsibility of the government of Canada towards First Nations to fully fund a comprehensive Post-Secondary Student Support Program and seeks to discredit First Nations peoples in regards to the management and use of presently allocated funds; and

Whereas there is a wide education gap between First Nations and the Canadian population, which the government of Canada has pledged to reduce; therefore

Be it resolved that the removal of the Post-Secondary Student Support Programme from the control of First Nations communities be opposed; and

Be it further resolved that the government of Canada be lobbied to:

- Prioritise efforts to address access for First Nations, Inuit and Métis peoples to post-secondary education; and
- Confirm the Post-Secondary Student Support Program (PSSSP) as a permanent First Nations community-level funded program which is comprehensive and available to all Aboriginal post-secondary learners; and
- Adequately fund the right to post-secondary education for First Nations by taking immediate action in following up the recommendations of its Standing Committee on Aboriginal Affairs and Northern Development contained in "No Higher Priority: Aboriginal Post-Secondary Education In Canada;" and
- Lift the 2 percent cap on the PSSSP and inject enough funds to ensure the right for Aboriginal peoples to free education is made possible.

2009/05:N08 **MOTION**
Local 68/

Whereas there is a lack of national data on college enrolments, tuition and ancillary fees, and funding over time and by region; and

Whereas much of this data is collected regularly for the university sector; and

Whereas the college sector is equally as important to society and the economy as the university sector; and

Whereas the current source of much of the data for colleges are bodies that represents college administrations; and

Whereas an independent source of data collection is preferred to reduce bias; therefore

Be it resolved that Statistics Canada be lobbied to collect and publish data on college enrolments, tuition and ancillary fees, and funding over time and by region; and

Be it further resolved that this data be available at no charge to the public.

The following motions were served with notice by the National Aboriginal Caucus.

2009/05:N10 **MOTION**

Whereas the Federation is a strong proponent of funding for Aboriginal Education for all Indigenous peoples in Canada; and

Whereas successive federal governments have grossly underfunded post-secondary education in Canada an have consistently failed to provide adequate funding to fulfill the government's fiduciary duty to provide education to Canada's indigenous population; and

Whereas the current policy to cap funding increases in the Post-Secondary Student Support Program at 2% per year constitutes a prime example of underfunding of Aboriginal Education and the possible elimination of the program would only exacerbate the funding deficit; and

Whereas full funding of Aboriginal learners in Canada would constitute a major, tangible, effort by the federal government to fulfill its responsibilities to the indigenous people of Canada with action and funding instead of just words, therefore;

Be it resolved that the Campaign for Aboriginal Education include a National Week of Action to be held in the fall of 2009 calling on the federal government to fully fund all Indigenous learners in Canada;

Be it further resolved that the week of action focus on such tactics as letter writing, petitioning, coalition work and direct calling of MP and Minister offices;

Be it further resolved that the campaign call for the lifting of the two percent cap on funding increases for the Post-Secondary Student Support Program and to call on the government to increase the budget to accommodate for the increase of population, tuition fees, and also to take into consideration inflationary pressures;

Be it further resolved that the campaign promote the self-governance aspect of current funding structures and call for greater accountability within the context of current program designs; and

Be it further resolved that the campaign promote research on the social and economic benefits of fully funding all Indigenous Learners.

2009/05:N11 MOTION

Be it resolved that the Native Women's Association of Canada's "Sisters in Spirit" Vigils on October 4, 2009 be endorsed.

4. OTHER BUSINESS

5. ADJOURNMENT

Tuition and Ancillary Fees

Campaign Goal

The Federation seeks to eliminate financial barriers to post-secondary education.

Background

The Federation has garnered widespread public support for affordable tuition fees. Polling consistently shows that an overwhelming majority of Canadians favour freezing or reducing tuition fees.

In the last decade, every province has frozen tuition fees for some period of time and tuition fees are currently frozen in every Atlantic province. The challenge for the Federation is to maintain the momentum towards lower tuition fees in provinces in which freezes and reductions have been established and create pressure on other provincial governments to reverse recent increases.

Despite progress on tuition fee regulation, many universities and colleges have moved to circumvent government policy by increasing fees for certain campus services. These ancillary fees are often subject to less regulation than tuition fees, and represent a critical issue facing students.

In most provinces, international students have been the target of the largest fee increases. Tuition fees for international students now average $14,487 per year, approximately three times the amount charged to Canadian students.

Policy Proposals

The Federation's proposals include, but are not limited to:

- The progressive reduction of tuition and ancillary fees at public post-secondary institutions across the country;
- The elimination of differential fees for international students; and
- The elimination of ancillary fees.

Implementation

Research: The Federation will continue to assemble research demonstrating the negative impacts of financial barriers on access to post-secondary education. Information will be collected describing alternative systems of post-secondary education in countries where no tuition fees exist. In particular, the Federation will rebut the research disseminated by proponents of higher tuition fees.

Government Relations: The Federation will continue to lobby for the restoration of federal transfer payments for post-secondary education and promote the positive benefits of coupling federal reinvestment with legislation that calls for the reduction of tuition fees.

National Awareness and Media: The Federation will develop and implement a communications plan that illustrates the need for a national strategy for tuition fee reductions. The Federation will also continue to expose regional and provincial disparities in accessibility.

The Federation will continue to highlight models of universally accessible post-secondary education from other countries, such as Ireland and Scotland.

Membership Mobilisation: The Federation will support regional student mobilisations that seek to freeze, reduce, or eliminate tuition fees.

Coalition Work: Member locals will be encouraged to solicit support for tuition fee reductions through the continued development of local coalitions. Special effort will be undertaken to seek the support of national professional associations.

Vote Education

Campaign Goal

The Federation seeks to:

- Make post-secondary education a prominent issue during the next federal general election;
- Educate voters about where the parties stand on issues that are important to students;
- Increase student and youth voter turn-out.

Background

For years the Federation has conducted an intensive "Vote Education" campaign to increase the number of students that vote and raise the profile of student issues during federal and provincial elections. Federation members take part in a coordinated campaign to organise all-candidates debates, create radio ads, campaign door-to-door, flood radio shows with callers, and write hundreds of letters.

During election campaigns, local party candidates are very sensitive to mobilization efforts in their community. So even if they tow a strict party line during the campaign period, they often have a permanent memory of who can mobilize in their community and who could potentially cost them the next election. Flexing students' muscle during elections is a key strategy for post-election lobbying.

In the fall 2008 federal election, most federal parties' platforms made substantial commitments to post-secondary education and research in their platforms. The resulting minority government and a change in the official opposition's leadership has led to constant election speculation, and it is likely that there will be a federal election in fall or winter 2009.

Implementation

Research: The Federation will produce a detailed analysis of the platform and legislative record of each major federal party.

Government Relations: The Federation will continue to meet with the leaders, central campaigners, and platform development teams for each major federal party leading up to the campaign period.

The Federation will continue to meet with Elections Canada officials to ensure that students can freely exercise their right to vote. Elections Canada will also be lobbied to develop a national strategy for campus polls.

Member locals will be encouraged to work with local returning offices to tailor outreach strategies and address concerns on an ongoing basis.

Membership Mobilisation: The Federation will run an intensive voter registration campaign on campuses across the country and hold events to promote advanced polling and the election day.

National Awareness and Media: The Federation will undertake an intensive media campaign to attract coverage of student issues and campus mobilising.

Coalition Work: The Federation will continue to strengthen relationships with organisations representing college and university staff and faculty, community organisations, as well as parents' and high school students' organisations.

Student Financial Assistance

Campaign Goal

The Federation seeks to increase access to post-secondary education and reduce student debt.

Background:

In Canada, more than half of all post-secondary students require some form of financial assistance. Three-quarters of those receiving student loans believe they would be unable to participate in higher education without this assistance. A robust and well-funded national system of student grants would reduce daunting levels of student debt and improve access to universities and colleges.

In 1998, the federal government belatedly acknowledged the student debt crisis by creating the Millennium Scholarship Foundation (MSF).

Regrettably, the Foundation has proven to be little more than a public relations stunt combined with a questionable research project that has subtly downplayed the effects of higher tuition fees and higher student debt.

In response to the Federation's campaign to replace the Foundation, the federal government has introduced a national system of means-tested grants to be administered by Human Resources and Skills Development starting in fall 2009.

The federal government is also poised to introduce a major transformation of the Interest Relief and Debt Reduction in Repayment (DRR) programs. Both programs will be replaced with a program called the Repayment Assistance Program (RAP). RAP will resemble the old Interest Relief program except instead of one level of interest forgiveness, struggling student loan borrowers will receive graduated levels of interest forgiveness, relative to income.

A second phase of RAP will provide debt forgiveness for those who have exhausted five years worth of the interest relief under the first phase of RAP.

Policy Proposals

The Federation's proposals include, but are not limited to:

- Grants: The federal government should consider terminating education-related tax credits and use the savings to augment the national system of grants.
- Integration: The Canada Student Loans Program should make further integration with provincial loans programs a top priority.
- Ombudsperson: The staggering levels of debt carried by many former students makes service errors a very serious, often life-altering, experience. Students need an independent office for dispute resolution and complaints investigation.
- Interest rates: The government should eliminate interest charges on public student loans.
- Part-time students: The federal government should give part-time students—many of whom have family responsibilities that prevent full-time study—equal access to the Canada Student Loans Program and the Canada Student Grants Program.

Implementation

Research: The Federation will continue to research the detrimental effects of student debt on access to public post-secondary education, and the economic and social consequences. The Federation will also collect research on the effectiveness of the new Canada Student Grants Program.

Government Relations: The Federation will coordinate an intensive lobbying session in fall 2009 to persuade federal decision-makers to increase the level of grants available. Member locals will be encouraged to meet with their local Members of Parliament to discuss access and student debt. The Federation will also pressure political parties to commit to student aid improvements in their election platforms.

National Awareness and Media: The Federation will coordinate national media events to raise awareness about the transition from the MSF to the Canada Student Grants Program. Member locals will be provided with template news releases and sample opinion pieces for submission to campus and local newspapers.

Membership Mobilisation: The Federation will prepare materials for distribution in the late summer and fall. Member locals will be encouraged to distribute materials at various events including welcome weeks and public forums.

Coalition Work: The Federation will continue to build widespread awareness and support among like-minded organisations about the need to shift federal student financial aid from loans to grants.

Copyright

Campaign Goal

The Federation seeks copyright legislation that balances the rights of users and creators.

Background

By balancing the rights of creators, owners, and users of copyrighted works, Canada's Copyright Act exists to encourage the creation of artistic and innovative works, ranging from books and paintings, to music and video, to computer software. One of the most important of the fundamental rights established in the Act is the ability of copyright owners (often not the original creators) to control the copying and use of their works. Copyright also protects the "moral rights" of creators by prohibiting their works from being unjustly appropriated and defaced.

At the same time, the Copyright Act also exists to ensure public rights of access and use. It provides several rights for users, including limited rights to make copies and re-mix works without permission through an exception known as "fair dealing". As such, a core principle of copyright is that knowledge must be shared to encourage creativity. A 2004 Supreme Court of Canada ruling confirmed that the purpose of the Copyright Act is to serve the public interest by underscoring the critical role fair dealing plays in ensuring access to, and use of copyrighted works.

Although copyright law can be very technical and complicated, the implications of unbalanced copyright affect almost every Canadian. A successful campaign for fair copyright laws must strive to make the issue accessible and non-technical. Broad participation should be encouraged from students who are visual artists, musicians, computer programmers, journalists, and others who re-mix culture.

Policy Proposals

The Federation's proposals include, but are not limited to:

- Expanding the definition of fair dealing;
- Anti-circumvention provisions that do not infringe upon statutory rights of access or personal privacy;
- A "Notice and Notice" provision that would only require internet service providers to pass on allegations of infringements, not enforce them;
- The elimination of statutory damages for those who are acting with the good-faith belief that their use of a work is justified by fair dealing; and
- The elimination of crown copyright.

Implementation

Government Relations: The Federation will present the results of the spring 2009 campus consultations to the federal government. The Federation will seek joint meetings of Heritage, Industry, and Post-Secondary Education critics of opposition parties. If amendments to the Copyright Act are tabled, the Federation will seek to testify before House of Commons Standing Committees.

National Awareness and Media: The Federation will develop a short online quiz about activities that would have been considered copyright infractions if the Copyright Act amendments tabled in 2008 had become law.

Membership Mobilisation: Member locals are encouraged to continue to hold local forums about the role of federal legislation and students' access to copyrighted material as creators and owners of copyright.

Coalition Work: The Federation will continue to work closely with the Canadian Association of University Teachers and other groups with a broad view of fair dealing.

Federal Funding

Campaign Goal

The Federation seeks a federal framework that ensures high-quality, universally accessible public post-secondary education.

Background

For more than two decades, the Federation has called for the establishment of a national act for post-secondary education and research.

After the introduction of the Canada Health and Social Transfer in 1996, accountability and transparency for federal post-secondary education transfers diminished. The situation did not improve with the creation of the Canada Social Transfer in 2004.

During the 2006 federal election campaign, Stephen Harper promised to create a dedicated transfer payment for post-secondary education. Shortly afterwards in February 2006, a summit on post-secondary education and research organised by Canada's premiers called for the reinvestment of the $4 billion that has been cut from annual federal transfers to the provinces for post-secondary education and research since 1993.

The 2007 federal budget restored $800 million in an "earmarked" federal transfer for post-secondary education. Earmarking the funding increases transparency somewhat; however, accountability concerns continue to plague the Canada Social Transfer. For example, in the same year that transfers for post-secondary education increased by $800 million, the Gordon Campbell government in BC cut funding to universities and colleges by $50 million.

The federal government also has the constitutional responsibility to provide resources for Aboriginal students to pursue a post-secondary education. Funding is provided through Indian and Northern Affairs Post-Secondary Education Program, the increases to which have been capped at 2% per annum since 1996.

Policy Proposals

The Federation's proposals include, but are not limited to:

- Restoring of federal funding for post-secondary education to 0.5% of Gross Domestic Product (an increase of approximately $2.5 billion per year);
- Increasing funding to the Post-Secondary Education Program to provide adequate funding to every eligible Aboriginal student;
- Creating a dedicated federal cash transfer payment for post-secondary education;
- Creating a Post-Secondary Education Act that establishes guidelines for quality and accessibility in post-secondary education and research that includes recognition of the needs of Québec and Aboriginal students; and
- Creating a federal Ministry of Post-Secondary Education and Research.

Implementation

Government Relations: The Federation will make the federal role in post-secondary education a prominent issue during the fall 2009 lobby sessions.

Research: The Federation will research similar post-secondary education system structures and legislation in other countries.

Coalition Work: The Federation will work with the Canadian Association of University Teachers to garner support among all parties for a Post-Secondary Education Act.

National Awareness and Media: The Federation will implement a communications strategy drawing public attention to the impact of federal under-funding on the accessibility and quality of Canada's universities and colleges. The strategy will focus attention on Prime Minister Harper's promise to create a dedicated transfer payment for post-secondary education.

Corporate Influence

Campaign Goal

The Federation seeks high-quality public post-secondary education that is free from corporate interference.

Background

Federal funding cuts over the past twenty years have starved post-secondary institutions, paving the way to increased reliance on private sector funding. Private sector involvement in public education manifests itself in corporate funding for university capital projects, interference in course curricula and research projects, and corporate-style governance of universities and colleges. Many campus services are being out-sourced to private corporations with a greater interest in profits rather than supporting the campus community and workers' rights.

In most cases, university and college administrations are willing participants in the corporatisation of campus. Board of Governors appointments from the private sector are often made in hopes of increasing fund-raising revenue. Greater corporate involvement changes the dynamic of governance at public institutions, and universities and colleges become less responsive to students, the community, and the public good.

Conversely, student representation in the highest levels of university and college governance is generally token. In many cases, the administration selects students with no formal connection to the students' union to "represent" students' interests with no mechanism to either collect student feedback or be held accountable for their actions at board meetings.

There is a recent trend to muzzle students' union representatives by making them sign confidentiality agreements and even force them to abstain from tuition fee increase votes out of "conflict of interest".

A consequence of the increasing corporate management of public post-secondary institutions is the reduction in the authority of university senates and college academic councils to oversee program development and creation. For example, some universities have sidestepped senate procedures to initiate for-profit language schools to generate increased revenue.

One of the greatest achievements of the student movement during the 1950s and 1960s was winning representation in university governance, or "academocracy" as it was called then. Today, the secrecy and top-down management style of corporate universities and colleges threatens to turn back the clock on student rights.

Policy Proposals

The Federation's proposals include, but are not limited to:

- Increasing students' union representation on boards of governors;
- Exposing corporate interference in university and college governance; and
- Increasing core funding for public post-secondary education.

Implementation

Government Relations: The Federation will prepare lobby kits for member locals to use during appointment processes, so as to influence the appointment of community representatives who are actually from the community, not elite business positions.

National Awareness and Media: The Federation will publicise the dangers of privatisation and commercialisation in public post-secondary education. When cases of corporate interference or academic misconduct arise the Federation will support, where feasible, cases with national significance. This may include legal challenges in cases where students' union representatives are reprimanded for breaking confidentiality agreements.

Membership Mobilisation: Member locals are encouraged to continue to gather information about examples of privatisation and commercialisation on campus.

Coalition Work: The Federation will continue to build widespread awareness and support among like-minded organisations about how privatization threatens public education.

AGENDA

Organisational and Services Development Committee

May 2009 National General Meeting

DAY ONE

1. **PREPARATION FOR COMMITTEE DELIBERATIONS**

a. **Ratification of the Committee Chair(s)**

Standing Resolution 1, Section 4, *Committee Chairperson,* states that as its first order of business each standing general meeting committee shall either: ratify as the committee chairperson(s) the National Executive member(s) appointed to the committee; or elect a committee chairperson from within its membership.

The National Executive is recommending that Deputy Chairperson Brent Farrington be ratified as chair for the Committee.

b. **Roundtable Introductions**

c. **Review of the Committee Agenda**

d. **Review of the Committee's Terms of Reference**

Committee members should be familiar with the responsibilities of the Organisational and Services Development Committee as established in the Federation's Standing Resolutions. Standing Resolution 1, Section 3.d) *Organisational and Services Development Committee* states that the Organisational and Services Development Committee shall:

i. review and make recommendations to closing plenary on the national structure of the Federation, including: the National Executive, the national staffing; the national office; and all other national structures of the Federation;
ii. review and make recommendations to closing plenary on the national programmes of the Federation;
iii. review the development of the 'profile' of the Federation within member local associations;
iv. review and make recommendations to closing plenary on the national communication tools of the Federation;
v. review and make recommendations on development of new members;
vi. review and make recommendations to the closing plenary on proposed amendments to the Constitution and Bylaws, Standing Resolutions and Operations Policy.

2. **REVIEW OF FEDERATION BULK BUYING SERVICES**

a. **Handbook/Dayplanners**

This year 53 students' unions in ten provinces are participating in the handbook/dayplanner service, with approximately 285,000 handbooks to be printed through the service. The Committee will discuss the progress of the service and ideas for the future.

b. **Website Design and Hosting**

The goal of the Students' Union Website Service, similar to that of the handbook/dayplanner service, is to produce a better quality product that meets the needs of member unions at an affordable price so that all member locals, regardless of their size, can improve communications with their members. The Committee will discuss the service and ideas for the future.

c. Orientation Products

Member locals typically purchase a variety of materials to promote services and campaigns to new and existing members, especially during the first few weeks of class each academic year. The service was created to help member locals secure significant cost savings by combining their purchasing power while ensuring that materials produced are ethically manufactured and of a high quality. The Committee will discuss ways to expand the service.

d. Student Health and Dental Insurance

The National Student Health Network is a buying consortium for student health and dental insurance that the Federation coordinates. Following a brief orientation to the service, the Committee will discuss strategies for improving and expanding the buying group.

3. REVIEW OF STUDENT DISCOUNT SERVICES

a. ISIC/Studentsaver

The Federation has run a national student discount program since its founding in 1981. The service utilises two discount cards: the International Student Identity Card (ISIC), which only full-time students are eligible to receive; and the Studentsaver card, which is available to all full- and part-time students belonging to the Federation.

Following a brief orientation to the services, the Committee will discuss preparations and developments, and will offer ideas, for the future.

b. Other Discount Activity

In 2008, the Federation again offered through its website free income tax filing with Ufile, an on-line tax filing service. This year, Federation members will be able to file their taxes for free for the entire calendar year allowing students more flexibility in filing their taxes. The Committee will discuss the service.

4. STUDENT WORK ABROAD PROGRAMME (SWAP)

The Federation has been running the Student Work Abroad Programme for more than 25 years. Following a brief orientation to the service, the Committee will discuss developments with and ideas for the service.

5. OTHER

Time permitting, the Committee will divide into smaller working groups to discuss possible ideas for the improvement of existing services and programmes as well as brainstorm new services to be offered through the Federation.

DAY TWO

6. MOTIONS REFERRED FROM OPENING PLENARY

The following motions will likely be referred to the Organisational Development Committee by the opening plenary.

a. Proposal on Climate Neutrality

The following motion and the proposed amendment to it were referred to the National Executive by the May 2008 national general meeting:

2008/05:024 MOTION
Local 44/ Local 73

Whereas according to the Fourth Assessment Report (November 2007) of the UN's Intergovernmental Panel on Climate Change (IPCC): "Warming of the climate system is unequivocal, as is now evident from observations of increases in global average air and ocean temperatures, widespread melting of snow and ice, and rising global average sea level"; and

Whereas the impact of unsustainable human activities such as industrial manufacturing, industrial agriculture, natural resource extraction and mass transportation have exacerbated and accelerated this warming by increasing concentrations of atmospheric greenhouse gases such as carbon dioxide and methane; and

Whereas the most positive and pragmatic approach to addressing this emergency is for individuals, organizations and nations to become not just climate-neutral, but to move beyond being climate-neutral; and

Whereas 'beyond climate-neutral' means that individuals, organizations and nations work to reduce their impact on the climate to net-zero and, in addition, work to contribute to larger climate change solutions (i.e. they do more to solve the problems of climate change than they do cause them); therefore

Be it resolved that the National Executive consult and work with the David Suzuki Foundation, Aboriginal people experienced in sustainable indigenous ecological practices, and any other relevant experts in order to make all national meetings of the Federation and the operations of the national office beyond climate-neutral by May of 2010; and

Be it further resolved that material and informational support be provided to all locals who wish to make the transition to move beyond climate-neutral.

2008/05:127 **MOTION TO AMEND**
Local 44/Local 75

Be it resolved that Motion-2008/05:024 be amended to read:

"Be it resolved that the National Executive consult and work with the David Suzuki Foundation, Aboriginal People experienced in sustainable indigenous ecological practices and any other relevant experts in order to develop a long-term strategy towards becoming climate neutral for on-site aspects of all national general meetings of the Federation and the operations of the national office;

Be it further resolved transportation for all national general meetings of the Federation and the operations of the national office be investigated as a separate initiative that includes environmental best practices and excludes carbon trading; and

Be it further resolved that the National Executive include a section on the progress of this initiative in the National Executive Report at the November 2008 AGM, including a timeline for implementation; and

Be it further resolved that material and informational support be provided to all locals who wish to make the transition to move towards climate-neutrality."

The National Executive recommends the defeat of Motion 2008/05:024 and 2008/05:127.

b. Proposal on Handbook Orders

2009/05:N01 **MOTION**
Local 3/

Whereas one of the most cherished principles of the Canadian Federation of Students is that every local, regardless of size, should have an equal say in the governance of the Federation; and

Defeat!

Whereas practices which favour larger locals stand in direct opposition to this principle; and

Whereas the Federation currently offers a 'volume discount' to locals that print more than 7500 handbooks per year; and

Whereas many smaller locals have fewer than 7500 members, and as such cannot access this discount; therefore

Be it resolved that the practice of offering volume discounts based on an arbitrary number of books ordered be ceased, and instead offer a volume discount to locals which order enough handbooks to supply 80% or more of their membership.

- small locals already benefit
- 80% is arbitrary
- 80% is too high for large locals in particular & even some small locals

c. Proposal on Referendum Spending Limits

2009/05:N02 MOTION TO AMEND BYLAWS
Local 41/

Whereas the Federation wants to ensure its processes to join and leave the Federation are as fair as possible; therefore

Be it resolved that Bylaw 1.4, subsection e,vi be amended to read:

vi. Referendum teams shall be subject to equal spending limits.

d. Proposal for a Multi-Campus Institution Caucus

2009/05:N09 MOTION TO AMEND BYLAWS
Local 26/

Whereas the Federation has a number of Caucuses to discuss issues which affect members of each caucus;

Whereas Multi-Campus Institutions deal with a number of distinct issues which Single Campus Institutions do not face; therefore

Be it resolved that Bylaw 9.3 be amended to include a "Multi-Campus Institution Caucus" as one of the Designated Caucuses.

7. DISCUSSION OF MEMBERSHIP DEVELOPMENT STRATEGY

8. OTHER BUSINESS

9. ADJOURNMENT

AGENDA
Policy Review and Development Committee
May 2009 National General Meeting

1. PREPARATION FOR COMMITTEE DELIBERATIONS

a. Ratification of the Committee Chair(s)

Standing Resolution 1, Section 4, *Committee Chairperson,* states that as its first order of business each standing general meeting committee shall either: ratify as the committee chairperson(s) the National Executive member(s) appointed to the committee; or elect a committee chairperson from within its membership.

The National Executive is recommending that Quebec Representative Noah Stewart be ratified as chair for the Committee.

b. Roundtable Introductions

c. Review of the Committee Agenda

d. Review of the Committee's Terms of Reference

Committee members should be familiar with the responsibilities of the Policy Review and Development Committee as established in the Federation's Standing Resolutions. Standing Resolution 1, Section 3.c) *Policy Review and Development Committee,* states that: "The Policy Review and Development Committee shall review and make recommendations to closing plenary on proposed amendments to the issues policy of the Federation, as proposed by Committee members and member locals on plenary floor."

2. CURRENT POLICY ISSUES DISCUSSION

The Committee will review and discuss policy of the Federation as it relates to policy changes of the government.

a. Technology

Preamble

The Federation recognises that the use of technology in all aspects of students life profoundly affects the student-teacher and student-student interaction of academic programs, the atmosphere of the institution, and the power structure within it.

Policy

The Federation:

- supports the use of technology when it encourages critical thinking, accessibility, and empowerment of students;
- opposes the use of technology as a substitute for classroom and student-teacher interaction;
- opposes the introduction of new technology solely as a solution to the under-funding of education; and
- opposes the use of technology by administration as a basis for limiting, rather than enhancing how academic programs and student services are delivered.

b. Student Support Services

Policy

Hours of Operation

The Federation encourages post-secondary institutions to provide hours of operation on campus so as to ensure accessibility for all students.

Child Care

The Federation supports the following:
- free, quality, on campus child care with proportional number of spaces reserved on the basis of financial need for undergraduates, graduates, faculty and support staff;
- the elimination of barriers to subsidised spaces for all families;
- the provision of special child care for students' unique needs, i.e., evening care, weekend care, free infant care, part-time care; and
- access to quality child care and parenting skills counseling for parents who are attending school.

Food Collection and Redistribution Services

The Federations endorses initiatives that eradicate the need for food collection and redistribution services and, until the need is eradicated, encourages members and non-members to participate in such services in cooperation with anti-poverty groups where possible, including the opening of food banks on campus.

Health Services

The Federation recognises the cycle of poverty and stress that leads to ill health and more stress. Moreover, quality education includes access to health services. These services should be available at all post-secondary institutions. The Federation supports:
- free and accessible health services for all students;
- free and accessible quality professional services, including psychiatric care; and
- free and accessible quality peer support services.

3. NEW POLICY DEVELOPMENT DISCUSSION

The Committee will discuss policy issues related to post-secondary education in Canada.

a. Management of University Endowments and financial investments.

The movement of universities to the "Harvard Model"—investing endowment monies in the financial and other markets and use dividends to finance projects such as student grants—have lead to losses of tens of millions of dollars. Currently, there is a lack of oversight and regulation by elected boards in universities in how much of these endowments can be invested in high-risk investment products or stock markets.

The Committee will discuss possible policy recommendations that would address the lack of regulation and oversight of investing endowment funds.

b. Autonomy of Granting Councils

Recently, the government ordered a strategic review of the three granting councils and removed $147.9 million from their budgets. $87 million of these "savings" are to be redirected to fund an increase in the number of Canada Graduate Scholarships (CGS) over the short term (3 years). However, the new CGS positions for graduate students under SSHRC are only for "business related" degrees and for students under NSERC and CIHR preference is to be given to students carrying out commercialisable research. This is an unprecedented level of interference by the federal government which undermines the peer review processes within the councils.

The Committee will discuss possible policy recommendations that would address the independence of granting councils.

4. OTHER BUSINESS

5. ADJOURNMENT

AGENDA
Provincial Component Meetings
May 2009 National General Meeting

1. **PREPARATION FOR COMPONENT DELIBERATIONS**
   a. **Roundtable Introductions**
   b. **Review of the Component Agenda**

2. **PREPARATION FOR SUBCOMMITTEES**
   a. **Overview of Subcommittees**
   b. **Overview of Selection Process**
   c. **Subcommittees Section Process**

   Standing Resolution 1, Section 2, *Committee Composition* states that:
   "Each caucus, constituency group and provincial component shall have the right to select one voting member to sit on each standing general meeting committee."

   The Component will select representatives for each of the following plenary sub-committees:
   - Budget Committee;
   - Organisational and Services Development Committee; and
   - Policy Review and Development Committee.

3. **REVIEW OF MOTIONS FOR CONSIDERATION**

   The Component will review the motions that were submitted with notice for consideration at the May 2009 national general meeting and develop recommendations for the motions.

4. **REVIEW OF MEETING LOGISTICS**

   Any questions or concerns about meeting logistics should be addressed at this time. Meeting coordinators will provide an overview of the transportation schedule from the meeting site to the airport.

5. **OTHER BUSINESS**

6. **ADJOURNMENT**

AGENDA
National Graduate Caucus
May 2009 National General Meeting

SESSION 1 – Monday, May 18, 2009

1. ATTENDANCE ROLL CALL

2. ADOPTION OF THE AGENDA

Changes or additions to the agenda may be proposed at this time.

3. WELCOMING REMARKS AND INTRODUCTIONS

4. PREPARATION FOR PLENARY SUB-COMMITTEES

a. Selection of Committee Representatives

Standing Resolution 1, Section 2, Committee Composition states that:

"Each caucus, constituency group and provincial component shall have the right to select one voting member to sit on each standing general meeting committee."

The Caucus will select representatives for each of the following plenary sub-committees:

- Budget Committee;
- Organisational and Services Development Committee; and
- Policy Review and Development Committee.

b. Review of Motions for Consideration

The Caucus will review the motions that have been submitted with due notice for consideration at the national general meeting.

c. Discussion of Other Sub-Committee Business

The Caucus will discuss any other business related to plenary sub-committees.

5. ROUNDTABLE DISCUSSION – PART ONE

Caucus members will provide a local by local update on the status of implementation of Federation campaigns and services

SESSION 2 – Monday, May 18, 2009

6. REPORT ON CAUCUS ACTIVITIES BY THE NATIONAL GRADUATE CAUCUS EXECUTIVE

An overview of the work undertaken by the Caucus during the reporting period will be provided.

7. CAMPAIGNS AND GOVERNMENT RELATIONS DISCUSSION

The meeting will discuss campaigns and government relations activities including:

- the campaign to expose the dangers of commercialisation of research;
- the campaign to maintain/restore post-residency fees;
- the campaign for whistleblower protection legislation; and
- the campaign for a balanced Copyright Act.

8. ADOPTION OF MINUTES FROM THE PREVIOUS MEETING

The meeting will consider the minutes of the previous meeting of the Caucus.

9. CAUCUS MOTIONS TABLED FROM PREVIOUS MEETING

The following motion was tabled from the February meeting of the National Graduate Caucus:

2009/02:33 MOTION

Local 79/Local 83

Be it resolved that a public, open, message, thread-based forum be set up and maintained by the National Graduate Caucus on the Federation's website, and one member of the of the Caucus Executive be responsible for basic maintenance.

10. UPDATE FROM PLENARY SUB-COMMITTEES

SESSION 3 – Wednesday, May 20, 2009

11. REVIEW OF CAUCUS FINANCES

12. CAUCUS ELECTION

At this time, an election will be held for the Graduate Students' Representative on the National Executive.

13. UPDATE FROM PLENARY SUB-COMMITTEES

Caucus representatives on each plenary sub-committee will report on the deliberations of the sub-committees.

14. ROUNDTABLE DISCUSSION – PART TWO

Time permitting, Caucus members will provide a local by local update on the status of implementation of Federation campaigns and services.

15. ADJOURNMENT

MINUTES

National Graduate Caucus of the Canadian Federation of Students
Thursday, February 26 to Sunday, March 1, 2009 Fredericton, New Brunswick

CALL TO ORDER—Thursday, February 26, 2009

17:20 The meeting was called to order by National Graduate Caucus Chairperson Graham Cox

1. **ATTENDANCE ROLL CALL**

Local 03	University of British Columbia Students' Union-Okanagan	Present
Local 23	Simon Fraser Student Society	Absent
Local 21	University of Calgary Graduate Students' Association	Present
Local 09	University of Regina Students' Union	Present
Local 101	University of Saskatchewan Graduate Students' Association	Absent
Local 96	University of Manitoba Graduate Students' Association	Present
Local 102	Brock University Graduate Students' Association	Absent
Local 78	Carleton University Graduate Students' Association	Present
Local 62	University of Guelph Graduate Students' Association	Present
Local 32	Lakehead University Student Union	Present
Local 110	Laurentian University Graduate Students' Association	Present
Local 39	McMaster University Graduate Students' Association	Absent
Local 94	University of Ottawa Graduate Students' Association des étudiant.e.s Diplômé.e.s de l'Université d'Ottawa	Present
Local 27	Queen's University Society of Graduate and Professional Students	Present
Local 24	Ryerson Students' Union	Present
Local 85	Saint Paul University Students' Association	Absent
Local 19	University of Toronto Graduate Students' Union	Present
	Trent Graduate Students' Association*	Absent
Local 47	University of Western Ontario Society of Graduate Students	Absent
Local 56	Wilfrid Laurier University Graduate Students' Association	Absent
Local 48	University of Windsor Graduate Students' Society	Present
Local 84	York University Graduate Students' Association	Present
Local 83	Concordia University Graduate Students' Association	Absent
Local 79	Post-Graduate Students' Society of McGill University	Absent
Local 67	University of New Brunswick Graduate Students Association	Present
Local 70	University of Prince Edward Island Graduate Student Association	Absent
Local 95	Cape Breton University Students' Union	Absent
	Dalhousie Association of Graduate Students*	Absent
Local 34	Mount Saint Vincent University Students' Union	Absent
Local 100	Graduate Students' Union of the Memorial University of Newfoundland	Present

* Prospective member

G. Cox declared that quorum had been achieved.

2. **ANNOUNCEMENT OF PROXIES**

G. Cox indicated there were no proxies for the meeting.

3. **WELCOMING REMARKS AND INTRODUCTIONS**

G. Cox provided welcoming remarks. Delegates introduced themselves.

4. **REVIEW OF ROBERT'S RULES OF ORDER**

G. Cox provided a brief overview of Robert's Rules of Order.

5. ADOPTION OF THE AGENDA

2009/02:01 MOTION
Local 78/Local 100

Be it resolved that the agenda for the February 2009 meeting of the National Graduate Caucus be adopted.

CARRIED

6. ADOPTION OF THE MINUTES

2009/02:02 MOTION
Local 94/Local 27

Be it resolved that the minutes of the November 2008 meeting of the National Graduate Caucus be adopted.

2009/02:03 MOTION TO AMEND
Local 79/Local 94

Be it resolved that the minutes of the November 2008 meeting of the National Graduate Caucus be amended so that Motion 2008/11:14 reads as follows:

Whereas it is seemingly difficult to mobilize graduate students and to involve them in the student movement;

Whereas locals have expressed difficulty in preparing and delivering campaigns of the NGC on their campuses;

Whereas an interest has been expressed at both the last (May '08) and present (November '08) meeting of the NGC for pre-fabricated materials to aid in running events promoting NGC campaigns;

Be it resolved that a kit containing materials produced for the purpose of carrying out events as part of and promoting the campaigns of the NGC be prepared by the NGC;

Be it further resolved that the kit contain at least the following items for each NGC campaign:

- Slide shows and talking points
- Printable and editable/customizable soft copies of promotional and informational materials such as posters and pamphlets
- Hard copies of materials that can be reused (e.g. banners, backdrops,...)
- A list of speakers appropriate to each NGC campaign, and where possible, speakers that might be available in each province;

Be it further resolved that locals be encouraged to contribute materials that they have produced for NGC campaign events;

Be it further resolved that an agenda item be added to the next standalone meeting of the NGC to discuss the creation of a national NGC campaign tour.

CARRIED

Local 27 delegate Mark Rosner was present at the November meeting. The attendance list was corrected.

2009/02:02 CARRIED AS AMENDED

7. PREPARATION FOR ELECTIONS

a. Introduction of Electoral Officer

G Cox said that the Executive recommended that Communications Officer Ben Lewis be appointed as the Electoral Officer.

2009/02:04 MOTION

Local 62/Local 67

Be it resolved that Ben Lewis be ratified as the Electoral Officer for elections conducted at the February 2009 National Graduate Caucus meeting.

CARRIED

b. Overview of Election Schedule and Procedures

Lewis said that elections would be held for the position of Caucus Chairperson and Caucus Deputy Chairperson for the 2009-2010 term. He said that the terms commenced in May 2009, at the conclusion of the national general meeting. He said that information about the positions could be found in Standing Resolution 19.

Lewis provided a brief overview of the electoral process and the time frame surrounding the elections process.

8. Review of Caucus Finances

a. Review of Expenditures

Caucus Deputy Chairperson Amy Cox reviewed caucus expenditures, reminding locals that the NGC budget is comprised of 1/3 of membership fees from locals with a graduate population that had some sort of formal structure, whether it was an autonomous graduate student union or a graduate caucus within a mixed students' union. She said that the review reflected what had been spent up to the previous week, but did not include most expenses for the current meeting. She explained that the "Revenue" column referred to the membership fees that had been remitted to the National Graduate Caucus of the Federation. She said the AGM line-item referred to the current meeting and that it would change as delegates claimed their expenses. A. Cox stated that the reported campaign expenditures are lower than in actuality due to shared costs with the Federation relating to the federal election campaign. Additional research costs also shared with the NGC and the Federation include those associated with the hiring of Angela Regnier to conduct contract research work on the revision of the Tri-Council statement on research ethics. These amounts are not yet reflected in the NGC figures. She said CAGS, communication costs, printing, and some research costs are shared with the national office and that these figures could change as the national office figures are updated.

b. Question and Answers on the Caucus Finances

Local 79 delegate Adrian Kaats asked how up-to-date the expenditures line was.

A. Cox said it represented the expenditures up to the Wednesday before the meeting, with the exception of those budget areas highlighted in the review.

Kaats asked what the subsidy, campaign line-items, and membership development line-items were for.

Lewis said that membership development included costs for sending Caucus executive members and staff to existing and potential member locals to give presentations on our campaigns and lobby work. G. Cox said that the line-item also includes the cost of producing the generic handbook for graduate student locals that are potential members or small locals that cannot afford their own.

A. Cox said that the subsidy applies to all locals who have an operating budget of less than 85 000 to travel to this meeting, which was similar to the Federation's National General Meeting.

G. Cox said that general line items for campaigns includes printing, travel costs associated with sending Ontario Researcher James Beaton to locals to give presentations on Caucus campaigns, and producing materials such as the post-residency fees campaign posters. G. Cox also said that press releases fell under this line item.

Kaats asked if anything other than campaign materials and logistical expenses were included in the budget.

G. Cox said that this line item does not include all the campaign materials present for this meeting.

2009/02:05 MOTION TO RECESS

Local 94/Local 78

Be it resolved that the meeting recess until Friday, February 27, 2009.

CARRIED

12:30 the Caucus recessed.

CALL BACK TO ORDER—Sunday, February 18, 2007

11:03 National Graduate Caucus Chairperson G Cox called the meeting to order.

9. PRESENTATION OF EXECUTIVE REPORT

a. The Caucus Executive reviewed the report.

b. Questions on the report.

Local 83 delegate Erik Chevrier asked how the Caucus measures the effectiveness of each campaign.

G. Cox indicated that the meeting's member-by-member round-table and working groups discussions show how each local is implementing campaigns, which allows members to highlight what has been effective locally for each campaign.

Angela Regnier asked Lewis if there was an update on the impact of the National Film Board production *RiP: A Remix Manifesto*.

Lewis indicated that Federation consultations on copyright will be held across the country by member locals to gage what concerns students, faculty members, and the campus community at large have regarding copyright issues and legislation. Lewis said this is not only a way to build awareness regarding copyright issues but also a way to legitimately criticise the federal government's failure to provide such consultations. He said 15 to 20 locals are hosting these consultations and that it will show the government that regular Canadians have a different view as to what constitutes fair copyright usage than big corporations.

Chevrier asked if there were more specific progress reports available.

National Executive Representative Melanee Thomas indicated that local campuses implement campaigns, and that as coordinators, the at-large positions on the executive seek feedback and direction from member locals.

Local 19 delegate Meghan Gallant said that it is difficult to measure campaigns as it's not always clear if we have won something. She also said that it depends on what each of us think the goals are.

Campaigns and Government Relations Officer Ian Boyko said this type of feedback is good from a first-time delegate such as Chevrier, as it may indicate the information we are giving is not as clear as it could be. He further said break-out groups are used to get feedback and develop future campaign direction. Boyko cited the copyright as a good example of where we have gotten good feedback from the public regarding their problems with the proposed new legislation. We have used that to decide how to move ahead.

G. Cox added that the Caucus executives integrate the status of the Caucus' campaigns in the report and include them in the discussion during panels, reports and round-tables to ensure that when we get to break-out groups, we can deliberate on what needs to be done with respect to these campaigns, as well as the most effective way to implement our decisions.

Kaats asked where the campaign kits asked for at the November meeting were.

G. Cox indicated that all the materials requested for the campaigns development at a local level were prepared.

Kaats said that he thought the spirit of the purpose of campaign kits was lost.

10. REVIEW OF FEDERATION SERVICES

a. Presentation of Federation Services

Communications Officer Ben Lewis gave an overview of Federation services that are of particular use to graduate student locals.

b. Questions on Services

Kaats asked if Morneau Sobeco was the broker that is used exclusively across the country for the National Student Health Network.

Lewis said that the aforementioned broker is not universally used across the National Student Health Network, as the goal is to get members the best plan at the lowest rate. Lewis indicated that the plans that make the best offer to locals are favoured. He then indicated that the National Student Health Network exclusively uses not-for profit organizations and brokers.

Kaats asked if, as an insurance provider, Greenshield ever was denied a contract, and if Morton Sobeco had a disproportionately high success rate of using Greenshield as their underwriter across the board.

Lewis indicated that he could not speak to the details as he did not have that information on hand.

Regnier said there were locals on the National Student Health Network who have not used Greenshield.

Local 110 delegate Brice Mulligan asked how many people used Ufile.ca, and how much the Federation paid depended on usage.

Lewis said that the Federation receives the usage information, but that that information was not included in the particular report he had on hand. He indicated he did not think the fee depended on usage.

Local 78 delegate Leslie Vaage asked if there was a manual or "how to" guide for the website template.

Lewis said that there was not at the moment, as the website template has recently been altered based on member feedback to make it more user-friendly. He indicated work was progressing on providing a forum for user support so other locals can share information with each other about the service.

2009/02:06 **MOTION**
Local 94/Local 27

Be it resolved that the report of the National Graduate Caucus Executive be accepted.
CARRIED

11. REPORTS FROM WORKING GROUPS

a. Federal Budget Campaign

Boyko reported back from the federal budget campaigns working groups.

The first session highlighted the big picture linkages between the forces that drive commercialization and the recent policy shift from the federal government to make funding business-related degrees a priority. One idea on how to express the problems with the policy shift in a campaign was to identify who in the Harper cabinet had a social science and humanities background. Advertising in digital media was considered given the falling cost due to the economic downturn.

Both the first and second group suggested highlighting MP Niki Ashton's petition, tapping coalition partners, increasing materials translation to other languages to reach out to international students, and motions from Senates condemning the budget move. A Day of Action, or several variations of a Day of Action, were considered to draw attention to the issue. The groups were sensitive to the need for short and long term strategies. The idea of a social science fair during orientation week was raised. A fax-off to local MPs and ministers was also considered. The groups thought that identifying local Cabinet Ministers and prominent alumni with social sciences and humanities backgrounds as individuals might help spark local campaigns, as well as trying to find scientists who might step up and engage on this issue. YouTube videos highlighting social science and humanities research (by graduate students) that demonstrates the interesting and relevant ways this research affects society was also flagged as a potential campaign tool.

Thomas added that campaign materials highlighting the disproportionate effects of the budget measure on constituency groups such as women were also discussed.

b. Copyright

Lewis reported back for the copyright campaign breakout group.

The groups focused on tracing the history and background of the copyright regime in Canada. Local-by-local round-tables focused on campaign implementations, plans for consultations, and film screenings. Some activities that locals were engaged in included panels, forums, evening of copyright with dinner, week-long activities around copyright, and some work with coalition partners. Giving presentations was also considered.

Themes that came up include seeking feedback from graduate students on the use of materials in the classroom; teachers and how they can or cannot use resources, intellectual property and academic codes, plagiarism, impacts of copyright on students. Discussion on the next steps for the campaign included preparation of a document on legislation updates, updated posters, librarians as pirates, and looking for other cases like Chris Radziminski where the federation might pursue defending students penalized for copyright issues to draw public attention to this issue.

c. Post-Residency Fees

Ontario Researcher James Beaton reported back for the Post-Residency Fees Campaign work-groups.

The groups focused on how to centralize available research and data. Systematic information on the history and current state of post-residency fees is needed locally to counter administration's arguments; there was an awareness of difficulties associated with this, but the group felt that pressing Stats Canada, the Tri-councils and universities may yield results. The possibility of getting the information collected for program reviews/accreditation which happens every few years for every program was also thought to be potentially fruitful.

There was a discussion about the concept of the library card and improving posters, or making videos with graduate students talking about their university library cards that cost them $5000 or more. The group talked about framing the conversation in economic terms, highlighting that universities invest into graduate students initially but then fail them in later years.

d. Whistleblower/Commercialisation

Thomas reported back from the Whistleblower/Commercialisation Campaigns work-groups.

Locals were at various stages of implementation of these campaigns. The role of student advisers and ombudspersons and their degree of use in helping and defending students who sought to blow the whistle on research misconduct was discussed, as well as the possibility of getting information about individual student cases from them. New concepts for posters as campus organizing tools were highlighted, as well as the necessity for seeking out provincial and national legislation. Joining the Canadian Research Integrity Committee (CRIC) was generally supported. Designing a kit using McGill's safe disclosure policy and research to help locals pressure their university's administration to develop policies was mentioned, though it was thought to be unwieldy given the unique nature of governing policies at universities in Canada. The Intellectual Property Scorecard was seen instead as a good tool to establish national patterns, and the groups thought it could be used as an internal advocacy and a public relations tool. Also suggested was the need to find alternative approaches to fund research than commercial funding and publicise those alternative funding mechanisms.

Boyko then highlighted that the Caucus has five major campaigns. He said that he thought that the Caucus has a fairly well developed campaign for copyright with film screenings and consultations. Boyko said that the Caucus could focus on any additional steps required for the spring for that campaign. He said the whistleblower campaign has not been completed as locals have not finished collecting information for the IP Scorecard and asked what new ideas could be used to rejuvenate the scorecards.

With respect to the federal budget, Boyko indicated that the Federation testified to parliamentary committess and sent out press releases in the short term, and asked about ideas for plans for the medium/long term on this issue. With respect to post-resident fees, Boyko reiterated that the caucus has pledge forms and posters, and asked what else the locals wanted or required to implement the campaign.

G. Cox indicated that the rest of Caucus business for the session could focus on the campaigns we have going, as there will be time tomorrow for new campaign ideas.

Chevrier said that the idea that choosing priorities of campaigns might be a good idea, so we can focus and direct our efforts in a better manner. He suggested a three-pronged approach with top priorities with a full action plan, a few reactionary and preparation campaigns in the middle and then reactionary campaigns at the bottom. He said that this could be better than throwing six campaigns at locals and having none of them work.

Kaats said that at the CFS-Ontario skills conference, he learned the idea of goal setting, with tactics and strategies and prioritizing. He said he would like to come out of this meeting where we could write a letter to the federal government and to the minister of finance with a few key points that we could all sign with a credible threat of mobilization if we don't get a response, and highlighted SSHRC funding as an example.

Gallant said it was worth keeping scheduling issues in mind. The federal budget is definitely a priority right now as it is on the table. As well, locals are already scheduling film screenings and working on campaigns. Gallant indicated that it is up to locals to prioritise other on-going campaigns. The letters the Caucus executive wrote to the minister of finance and other government members could be tweeked and used locally.

Local 94 delegate Federico Carvajal said we only meet a few times a year and don't quite have the time to develop every aspect of campaigns at these meeting. There are more obvious campaigns like SSHRC and the budget right now, while others need to just keep moving along because we don't know when they will become a major priority like copyright. It also takes time to collect data and do research. Carvajal said we need to pick topics that we can get that information and then move on it and figure out how to use it at the next meeting. The campaigns we do have are the ones we agree on and have chosen collectively.

2009/02:07 **MOTION**
Local 94/Local 79

Be it resolved that a committee be struck of representative from locals 79, 94, 84 and other interested delegates, with the assistance of the Executive, to draft a letter expressing the Caucus' opposition to the Tri-council cuts in the latest federal budget;

Be it further resolved that locals be encouraged to add their signatures to the letter.

Kaats motivated for this letter to be sent to the Minister with the weight added by the names of interested delegates.

G. Cox said that the Executive had drafted a letter previously, addressed to the Minister of Finance, by the NGC as a template that could be used for the new letter.

Local 96 delegate Andy Bonar indicated that the letter needed to be short and sweet.

CARRIED

Local 84 delegate Phillip Steiner added that locals should prioritise campaigns, and that SSHRC is an immediate priority. Locals could produce YouTube spots to raise awareness.

Kaats suggested the NGC get ahead of the curve on copyright by demanding immediate public consultations held by the government.

2009/02:08 **MOTION**
Local 96/Local 27
Be it resolved that discussion be limited to the federal budget and SSHRC.
CARRIED

2009/02:09 **MOTION**
Local 94/Local 84
Be it resolved that the NGC executive explore the possibility of using national media ads in the federal budget cuts campaign and use them if deemed feasible.

Steiner motivated for the motion, asking to explore if this is feasible. If so, and if we have budgets for it, he thought it would be ideal to pursue some national ads protesting policy shifts in the federal budget.

Kaats asked a point of information: what does within our budget mean? What happens if we do or don't think this is feasible?

Boyko indicated an exploration could result in a discussion on the listserv or at the next meeting about costs after a feasibility study.

Regnier said we could get financial support from other organizations like the CCR as well as others, or CAUT. If this route is pursued, Regnier said we should approve coalition members for an ad campaign.

Local 94 delegate Gaétan Beaulière asked if the ads were deemed feasible, how would we determine the content of the ads?

Steiner said that cheap is still expensive and we will have to look at various options. Resources and time will matter. We won't have time to design all of this, but the working groups should have given us some good ideas. The motion should remain open and be flexible.

Kaats said he wanted to give the exec a mandate to do it if they think it's feasible. He thought we should amend the motion to let them run with it if it's feasible.

Bonar said that, financially the Caucus appears to be under-budget, and there is a pressing issue, and advertising on TV will get us a broad audience.

Chevrier said that newspaper ads are too expensive, and do not provide enough coverage. Instead, he suggested the Hour and YouTube videos, but YouTube videos have to be awesome else no one would watch them.

Mulligan asked what was meant by feasibility? He said the definition remained unclear.

2009/02:10 **MOTION TO END DEBATE**
Local 94/27

Be it resolved that the question be called.

CARRIED

2009/02:09 **CARRIED**

2009/02:11 **MOTION**
Local 19/96

Be it resolved that members locals be encouraged to pass motions at their local Board of Governors and Senates opposing the cuts to the Tri-council funding and opposing the direction of SSHRC Canada Graduate Scholarships to business-related degrees.

Be it further resolved that member locals be encouraged to collect letters from their members to send to the minister of Finance.

Gallant motivated that all agreed local mobilization is key and getting these letters would be a great step in getting the university and faculty engaged as well. This will help us bring everyone together.

Thomas encouraged locals to keep the NGC updated about any actions taken locally.

Local 27 delegate Mark Rosner said he liked the spirit of the motion and knew that, at Queens, faculty has been paying attention to this issue and there is definitely room for movement at the local level.

2009/02:12 **MOTION TO AMEND**
Local 27/94

Be it resolved that locals be encouraged to communicate all actions listed above to the Caucus listserv and the Caucus executive.

CARRIED

2009/02:13 **MOTION TO AMEND**
Local 94/110

Be it resolved that "And local member councils" be added to the second line of Motion 2009/02:11.

Mulligan motivated that getting our local councils involved is really important before taking things to administrations.

Beaulière said it would also be good for a letter writing campaign to the federal government to let them know our local councils have passed these motions.

CARRIED

2009/02:14 MOTION TO END DEBATE
Local 94/ Local 79

Be it resolved that the question be called.

CARRIED

2009/02:11 CARRIED AS AMENDED

2009/02:15 MOTION
Local 94/ Local 79

Be it resolved member locals be encouraged to submit information on IP policies and whistleblower protection policies to the NGC executive;

Be it further resolved that the executive follow up with each of the locals if they have not submitted information on this issue in the next two months.

Kaats said that the IP Scorecard has been on the table and locals have not done their share and taken responsibility to give data. He elaborated that the executive needs this data from the locals to help design effective campaigns for locals to implement. He also stated that Local 79 had already passed in their information.

Rosner stated that executive turnover may make it difficult for locals to gather the information and turn it in. He said that the information required can be hard to find and takes time to collect. He suggested that a listserv discussion about how to do this well would be good.

2009/02:16 MOTION TO AMEND
Local 83/Local 79

Be it resolved that the information obtained by member locals be published online as well as other possible outlets.

Chevrier stated that publishing this information might help put pressure on universities to make IP and other information more readily available.

CARRIED

Kaats said that to get the data, it did take a long time to comb through university policies, and that they still needed to request some of the information from administrators.

Regnier said that the University's Technology transfer offices should have a chunk of this information. She said Local 19 got much of their information from there.

Boyko said that James Beaton compiled an email or a file with all the different places to collect this information and locals struggling to find their university policies could ask James for the best places to look.

Kaats said that the technology transfer office and Research Grants office is the other place this info might be found.

2009/02:15 CARRIED AS AMENDED

2009/02:17 MOTION
Local 94/Local 96

Be it resolved that the discussion move on to the Post-Residency Fees Campaign.

CARRIED

Boyko stated that there had been a redesign of this campaign and that the Caucus executive can now produce tailored posters and pledge forms. He said that locals need only contact the Caucus Executive to get them.

2009/02:18 MOTION
Local 94/Local 27

Be it resolved that locals be encouraged to record videos of members regarding post-residency fees at their University and submit these to the Caucus Executive.

Carvajal said this campaign seems to be a struggle at different places and the proposal of the library card testimonials on video seems like a great idea. He said that the Caucus might need some help from the executive and try to standardize these videos and share them.

Local 24 delegate Lindell Musselman said YouTube.com is pretty easy to use, you can use a laptop and record something yourself and put in On-Line. She said that the Caucus could create an account and share it.

Steiner said that there is a difference between YouTube and an ad campaign. He said that YouTube has content that is uninteresting and that is ignored all the time. Partnering up with local media folks could be a great way to produce high quality stuff.

Musselman said that locals could find someone to rip things and paying an artist fee to compile everyone's together.

Kaats said this it was unlikely to happen at Local 79 unless he does it. He said this was not going to happen.

Bonar said some locals do not need to do this. He said he understood that the motion only says to encourage, but suggested that it may be more of a provincial matter. The locals who wish to can work together to do this.

Carvajal said it was a motion to encourage and if any local does it and makes it available to the rest of us, then it would be great to share this with others.

Regnier said that this seems to be a bit of discussion about a centralized plan for videos, or locals making a grassroots video that maybe can be compiled. She said that she thought encouraging people to use the internet and local skills was a great thing.

Boyko said that if delegates thought this was a horrible idea and will waste the NGC executives' time, then delegates should not vote for it, but if you think its a good idea, but maybe does it not appeal to you, then maybe voting for it so people can share might not be a bad idea.

Chevrier said this is basically a bad idea for his local because he did not want to show his members this campaign. He said members at Local 83 pay little tuition and did not want to hear about lowering tuition or post-residency fees elsewhere. He felt he could not share such information with his members.

Kaats said that the Caucus should not have to pick this fight as it might not work in our favour.

2009/02:19 **MOTION TO END DEBATE**
Local 94/Local 110

Be it resolved that the question be called.

CARRIED

2009/02:18 **CARRIED**

Local 79 delegate Adrian Kaats asked for his abstention to be noted.

Steiner said that the delegates may want to pay attention to first time speakers on the list. It seems like maybe we might be ignoring people. He said that while individual member locals do have different issues, he knew in Quebec that the reason there were post-residency fees because a very strong powerful student movement fought for them, not because the university administration gave those fees to member locals.

Bonar sated that his administration may pick up Caucus materials and use them against us.

2009/02:20 **MOTION**
Local 79/Local 48

Be it resolved that locals be requested to send in information to the Caucus executive detailing the history of post-residency fees at their institution.

Kaats said that there is much discussion around people not remembering the past and thus collecting this data could be very useful for this campaign.

Mulligan spoke in favour of the motion, and said he was in favour of getting this information.

Boyko said the Caucus used to have a fact sheet on post-residency fees that could be updated to help locals out.

2009/02:21 **MOTION TO AMEND**
Local 110/Local 62

Be it resolved that the information be compiled into a fact sheet for distribution to locals to aid in lobbying to reinstate or maintain post-residency fees.

CARRIED

2009/02:20 **CARRIED AS AMENDED**

2009/02:22 **MOTION TO RECESS**
Local 32/Local 96

Be it resolved that the Caucus recess until Sunday, March 1.

CARRIED

18:00 the Caucus recessed.

9:40 National Graduate Caucus Chairperson Graham Cox called the meeting to order

Kaats said that he wanted to develop a letter on copyright legislation. He said he was not sure who to send it to but he had a template that delegates can fill-in and then send it off like we did for the letter on funding cuts.

Lewis said that we could send it to several ministers. He said that he thought a more comprehensive letter including what we would like to see implemented would be better.

Boyko said that unlike the funding cuts letter, we do not have a letter that has been carefully crafted and suggested that writing by committee would be difficult.

Kaats said that the Caucus should request open and public consultations and that it does not need to be more than that and does not have to address our positions or be comprehensive.

Mulligan said that maybe Local 79 should write a letter and then bring a motion forward so that we could discuss it.

Steiner said that procedurally there may be a way to print these letters up, but wondered about if we could not print them at the meeting.

Lewis said that the Caucus can serve notice to the government about this issue without a letter with signatures.

2009/02:23 **MOTION**
Local 79/Local 83

Be it resolved that the Caucus draft a letter demanding open and public consultations across the country regarding copyright and its legislation.

Be it further resolved that the letter be sent to the ministries of Industry, Heritage and Official Languages.

Be if further resolved that the letter be signed by all members in attendance at this meeting.

Chevrier said that it should not be a two-line letter, it should be properly researched and go to the government with a full package.

Rosner said that asking for public consultations was good, but suggested that the Caucus be more specific about our goals and include details of why we are calling for consultations. He said that it should not just be a letter, but it should be an effective letter.

Gallant said that the Federation was doing its own consultations and suggested that it would make more sense for the Caucus to wait until after those finished.

Kaats said that the Federation presented a letter before and that it was somewhere in the campaigns section.

Lewis said that there was a statement on copyright and it has been circulated and distributed to some strategic Members of Parliament.

Kaats said that the Caucus had already developed this and that writing long lists of demands is not as effective as just a two-line letter where we make a simple demand.

Chevrier said that the point was to go on the offensive and to take some first initiatives, but suggested that there should still be more information in the letter and the demands should be about education. He said that the Caucus should be specific.

Local 78 delegate Lesley Vaage said that she did not think that we were on the defensive, and that we were on the offensive, but suggested that crafting a good, well thought-out letter was important. She said that Local 78 had passed a motion on this issue but that not every local may have and that they might want to check with their membership about this.

2009/02:24 **MOTION TO REFER**
Local 19/Local 84

Be it resolved that this motion be referred to the Caucus Executive.

CARRIED

12. ELECTION

Lewis announced that ballots would be distributed for the positions of Caucus Chairperson and Deputy Chairperson and collected as the meeting continued.

2009/02:25 **MOTION TO AMEND MOTION 2009/02:07**
Local 32/Local 100

Be it resolved that motion be amended so that the NGC letter in the delegation package, addressed to the Finance Minister, be used instead of the letter presented.

Local 32 delegate Will Dechert asked who wrote the letter being presented now at the meeting.

Kaats said that he, Gaétan Beaulière from Local 94, and Philip Steiner wrote the letter that was being projected. The letter in the binder was written by the Caucus executive.

Chevrier said there should be some research in the letter on the screen.

Mulligan said since someone wrote this new letter, the Caucus should send it instead of just dismissing the work done.

Kaats said the reason for re-arranging the NGC letter is because it is not a template letter, it's a different letter and it is visually different. This will make it stand out. He said he changed very few things and made it more strongly worded so it is targeted to the Canada Graduate Scholarships.

Jalbert said she preferred the language from the letter in the package as it is not as aggressive as the new letter.

Rosner said he agreed with Jalbert, and did not think making harsh demands was a good idea. He said that the Caucus should be engaging and respectful in our tone and conversation because it is more strategic. Having many of the same letters is a good idea and drives home the idea of our commitment to the issue.

Local 62 delegate Meghan Nicholson said that the wording on the screen was a little harsh, but also said she could see the point in having a letter signed today. Walking away with something tangible could be good as well as having a ramped-up letter showing we are stepping this up a bit.

Jalbert said that she felt the Caucus was projecting an image and we should be careful about projecting an aggressive image.

Kaats said that maybe taking out the word "demand" is a good idea because it is aggressive, but said he did think it was a good idea to use different letters.

Dechert said the discussion was going in circles, one letter has numbers in it and one doesn't, maybe we should merge the two or something. He suggested a 20 minute caucus and coming to a consensus.

Chevrier said he agreed and asked if the previous letter had been sent to the government.

Boyko said that the letter included in the package had only been sent only over the members' listserv and was intended as a template resource for locals to use.

2009/02:25 **DEFEATED**

2009/02:26 **MOTION TO AMEND**
Local 79/Local 83

Be it resolved that the word ``demand" be replaced with ``request".

CARRIED

Regnier said that she was getting the sense that people were not really focused on editing on the floor and suggested a recess.

Steiner asked if the Caucus can find an alternative process for editing.

Kaats said he would be happy to fix this letter for 15 minutes in an *ad hoc* meeting.

2009/02:27 **MOTION TO RECESS**
Local 79/Local 32

Be it resolved that the Caucus recess for 15 minutes.

CARRIED

11:10 G. Cox called the meeting back to order.

Lewis said that Local 62 delegate Meghan Nicholson had been elected Caucus Chairperson and that Local 94 delegate Gaétan Beaulière had been elected Caucus Deputy Chairperson.

2009/02:28 **MOTION**
Local 79/Local 110

Be it resolved that Meghan Nicholson be ratified as the Chairperson of the National Graduate Caucus for the 2009-2010 term.

CARRIED

2009/02:29 **MOTION**
Local 3/Local 48

Be it resolved that Gaétan Beaulière (Local 94) be ratified as Deputy Chairperson of the National Graduate Caucus for the 2009/2010 term.

CARRIED

2009/02:30 **MOTION**
Local 32/Local 27

Be it resolved that the ballots be destroyed.

CARRIED

Lewis reminded the delegates that he was dealing with reimbursements in the back of the room for incidental travel expenses and that an info sheet passed around for everyone to write their email addresses, name and local number for the letter.

2009/02:31 **MOTION TO END DEBATE**
Local 3/Local 48
Be it resolved that the question be called on Motion 2009/02:25.

CARRIED

2009/02:07 **CARRIED AS AMENDED**

Local 27 delegate Mark Rosner said he would like to know which locals deal with travel grants. He said that this was probably a good question for the listserv, but he would like to know how other locals deal with this issue.

Steiner said that they do this at York University and could give Rosner some info on this issue.

G. Cox said that the Caucus will move onto the discussion of new business.

Local 19 Delegate Michelle St-Amour said that she read over the minutes from November and saw a discussion about bike co-ops. She said that Local 19 does have this information and could provide it to anyone who might be interested in it.

2009/02:32 **MOTION**
Local 83/Local 79

Be it resolved that the Caucus' listserv be unmoderated.

Chevrier said that the listserv should be unmoderated, but he said that we do not want spammers. He said all locals should be allowed on it.

Rosner asked how the current system works.

Boyko said all Federation listservs are monitored by Lewis and himself to clear out spam. He said that there was moderation for inappropriate language.

Thomas asked if there had been past instances where emails have not been sent out, as it was her impression that all posts to the listserv by members had gone through to the list.

Boyko said that there was an on-going debate on that issue.

Kaats said that he did not think listservs should be censored.

Gallant said that there is not any issue with the way the listserv is currently used and in her experience the biggest problem is that people do not use it enough. Frequently people make simple mistakes and having it moderated keeps people from being embarrassed.

Chevrier said he thought it was a problem now and that it could be a problem in the future.

Jalbert said that back and forth conversations with strong language can be unproductive; she said that maybe a message board is a better idea than an unmoderated listserv.

Kaats said a message board, un-moderated, was a great idea. He said that this was not the norm for organizations like this.

Regnier said that people do not use the listserv enough, and the point was not about censorship.

Steiner said he could see what the point of both sides, but that he personally loathes un-moderated listservs because there is too much back and forth. He suggested that maybe having a second list would not be a bad idea, but said he was not sure why we need both.

Kaats said he would like the caucus to focus on what Chevrier said about there being time and efficiency issue as well. He said he sent out an email a few days before the meeting and it was not sent out until this day. He said it is about time, and efficiency, and a sign of a healthy democracy to have an unmoderated listserv.

Local 67 delegate Neil Cole said that moderation is valuable as it stands. He said it is not about censorship and its about making sure emails are not spam and include information on what needs to be included.

Local 96 delegate Aaron Glenn said that his local would like to be added to the listserv, and it would be good if more than one person was on the listserv. He suggested that a wiki or a message board that someone monitors might be good.

Lewis said that the people that moderate the listserv are very accessible by phone, and any one can call them if there is something that is pressing and that it should go out that day. He also said that they were circulating an info sheet to get the emails of local reps to put on the listserv, but people change email addresses, others flag them for spam, there are many technical reasons for some of the difficulties and we do our best to keep it up-to-date.

Steiner noted that an un-moderated list is not the same as a public list.

2009/02:32 **DEFEATED**

2009/02:33 **MOTION**
Local 79/Local 83

Be it resolved that a public, open, thread-based message board be set up and maintained by the National Graduate Caucus on the Federation's website, and one of the Caucus Executives be responsible for its basic maintenance.

Kaats said that the motivation for this motion we that he thought the caucus should find a way to communicate with each other on a regular basis.

Chevrier said that he could see why others might not want more emails, but this was important for democracy.

Jalbert said that a completely open, public forum on the website did not sound like a good idea. She asked why the Caucus would want the forum to be public if the point was for graduate students to communicate with each other.

Steiner said that he could set up a public blog to do this, suggested that the public part would invite all kinds of ridiculous people posting, attacking, stalking and so on.

Rosner said that the Caucus could make better use of the Executive's time than setting up another listserv. He said that we can talk amongst ourselves of how to do this if delegates want to communicate more.

Kaats said that it was easy to set up a message board. He said that it could be done so that the public can see it, but not write on it. He said that this would show there are not problems with dissent in the organization and would safeguard democracy.

2009/02:34 **MOTION TO TABLE**
Local 19/Local 27
Be it resolved that this motion be tabled until the next meeting.

Gallant said that she had not had a chance to read the motions being presented and did not understand the intent of the points being made in favour of the motion. She said that she would like to think about this with others at her local. She said that the meeting was running out of time for such a discussion. She also said that the Caucus had forums online in the past and they ended up overridden with lewd content, spam, and it was not used by the members or the locals. In the end, the forum had to be taken down. It seems like more notice, time, and thought would be both good and required for such a motion.

Kaats said that he was strongly opposed to the motion to table. He said it was a simple motion and should be dealt with now. He said he did not know what problem was of having this message board, and there are ways we can get around the spam issue.

Bonar said that the Caucus should accept this motion because we were asked to do it, since our member asked us to do it. He said he did not understand why the public should not have access to such a message board, and if a problem arises then we deal with it then.

Chevrier said the motivation is that others would have access to it.

Gallant said that it was not at all clear to how this was supposed to work.

A. Cox said that she did not understand how a message board would work either.

Steiner said that there were a million ways to set the system up.

Regnier said that there were obviously many technical issues here, but asked what the point is of the message board was. She suggested that if people are serious about bringing important motions, then others need to respect the right of everyone to consider these motions at their locals as well.

2009/02:35 **MOTION TO END DEBATE**
Local 100/Local 3
Be it resolved that the question be called on Motion 2009/02:34.
CARRIED

2009/02:34 **CARRIED**

Motion 2009/02:33 was tabled until the May meeting of the Caucus.

Boyko said that because of time constraints the Chairperson may want to limit debates to 3 speakers for and 3 against, and prioritise first time speakers.

2009/02:36 MOTION
Local 79/Local 83

Be it resolved that the Caucus Executive present a detailed report to the assembly at the May meeting of Caucus concerning the possible methods for implementing a public, open, thread based message board hosted by the CFS.

Kaats said that he wanted people who would implement a message board to write a report and tell delegates the ways one could work.

Chevrier expressed concern that any moderation of the listserv could be considered fascist.

Rosner said this report was a waste of Caucus' Executives' time. He said interested members should write a report and locals can decide for themselves if they think the report is good or not.

Jalbert said she was against the motion. She said that her concerns about the message board were not about democracy, but about technical details and operation.

Gallant spoke against the motion. She said that she was offended by being called a fascist and did not understand why those who think it is so easy to do would not come up with a background and a report and share this information with the rest of the Caucus.

Kaats spoke in favour. He said he disagreed with everything that is being said and wanted it on the record that this is going to be addressed and a report be presented. He said he wanted something to happen in the meantime and that the people who are going to operate it take responsibility for it. He said it was not a waste of time and it is about democracy and freedom.

2009/02:36 DEFEATED

Beaulière said that it was worth having a conversation over the listserv about this idea and suggested that Kaats could start this conversation and keep it going.

2009/02:37 MOTION
Local 79/Local 83

Be it resolved that locals receive no later than one calendar week before any meeting of the NGC all meeting materials including a detailed agenda and brief description of each item on the agenda;

Be it further resolved that a call for agenda items from member locals be made over the NGC listserv at least one month before any NGC meeting, and then again one calendar week after that.

Be it further resolved that no materials including agenda items shall be accepted for inclusion with the materials described in the first resolution of this motion after the date two weeks before the beginning of the meeting in question.

Local 78 delegate Kim Wucher said that the motion sounded like it was trying to change the bylaws and suggested that it was out of order.

G.Cox said at first glance it did not seem out of order, but that sentiment could be challenged.

Kaats said that the motion did not change emergency motions; it only gives delegates an opportunity to get things in advance.

Bonar stated he was in favour of the motion. He said that a similar motion was recently passed at his local and thought it makes sense to give delegates time to think and talk before coming to the meeting. He also said technology gives the Caucus this new opportunity to improve past practice.

Nicholson said she was against the motion. She said the motion does say that nothing can be added to the agenda two weeks before the meeting. She also did not see what needed to be changed in current practice and thought that the motion would be overly restrictive.

Misener said he was against the motion. He said that it did not seem very feasible and while sending some items over email in PDF could be useful, he did not think sending out everything in the binders before hand was.

Local 21 delegate Mohamed Sorour said he was in favour of the motion. He said that Local 21 only got notice in the beginning of February and did not really know what was going on and need some extra information in advance.

Wucher said that she was sure that the motion was out of order.

G. Cox paused the debate to investigate whether the motion was in order. After consideration, he said there was one part of this motion would change Standing Resolution 19. Standing Resolutions can only be modified at Federation General Meetings; as such, G. Cox ruled Motion 2009/02:37 out of order.

Kaats said he would like to challenge the Chairperson's ruling.

2009/02:38 **MOTION TO SUSTAIN THE RULING OF THE CHAIR**
Local 79/Local 83

Be it resolved that the ruling of the chair be sustained.

Kaats said that he thought the effect of the motion depended on how the motion was read.

Boyko said that the Caucus was not following any procedure here and the Chair has been challenged, so procedure needed to be properly followed.

Boyko moderated the challenging of the chair. He said that the mover of the challenge had time to make his point, then G. Cox would be able to make his point, and then the Caucus would proceed to a vote with no further debate as per Robert's Rules of Order.

Kaats said Standing Resolution 19 could be interpreted to be only talking about proposed agendas. He said that Local 79's motion was not in contravention of this.

G. Cox said that all agendas that come to the meeting are only proposed or draft agendas until the member local delegates arrive at the meeting and accept the agenda.

2009/02:38 **CARRIED**

Motion 2009/02:37 was ruled out of order.

Gallant asked how many more motions were left and where the Caucus was on the agenda.

G.Cox indicated that Local 79 had requested to move a few more motions asked the delegate from Local 79 to read them out.

2009/02:39 **MOTION**
Local 79/Local 83

Be it resolved that minutes from any meeting of the Caucus be clearly marked as unapproved and communicated to member locals no later than one calendar week after the adjournment of the meeting.

Kaats said that delegates needed the minutes soon after the meeting so they could follow up with the business discussed at the meeting.

Woucher said that the motion seemed to be a policy or bylaw, and should not be moved at this meeting.

Mulligan asked how one would modify Standing Resolutions.

G. Cox said they get served at the General Meetings held in November or May with notice, and are voted on at plenary by all voting members of the Federation.

Rosner said he was against the motion. He said these motions were procedures. He said that he kept a common notebook with him so he could take notes throughout the meeting about what he would like to do and what he did not want to carry out at his local. He said that the Caucus was a local-driven organization and that it was up to locals to do their jobs and take responsibilities.

Chevrier said that this was about helping the process and facilitating democracy. He said if everything is about the local then what was the point in being at the meeting? He said that if the Caucus was supposed to develop national platforms then it needed to be structured better to do this job.

2009/02:40 **MOTION TO END DEBATE**
Local 100/Local 32

Be it resolved that the question be called.

CARRIED

2009/02:39 **DEFEATED**

2009/02:41 **MOTION TO ADJOURN**
Local 100/Local 32

Be it resolved that the meeting be adjourned.

CARRIED

13:27 the meeting adjourned.

Letter To National Revenue Minister

January 27, 2009

The Honourable Jean-Pierre Blackburn, PC, MP
Canada Revenue Agency
555 MacKenzie Avenue
Ottawa, Ontario K1A 0L5

Re: Post-Doctoral Fellow Award Taxation

Dear Minister;

The National Graduate Caucus of the Canadian Federation of Students, representing over 60 000 graduate students, is concerned about the recent decision taken by the Canada Revenue Agency (CRA) to regard all post-doctoral fellow income as taxable.

Previously, the categorization of post-doctoral fellow income as taxable was a decision made at the provincial or institutional level. A basic review of the current status of university policies and practices relating to post-doctoral fellows and their status as students, trainees or employees indicates that there is little consistency among them. A number of universities administratively categorize their post-doctoral fellows as both students and employees.

The CRA's decision to uniformly impose a new status on all post-doctoral fellow incomes is extremely problematic. Most post-doctoral fellow incomes are limited and post-doctoral fellows need the non-taxable status to pay for basic necessities. Post-doctoral fellows who did not anticipate paying federal taxes on their income this year, primarily located in the province of Quebec, remain in limbo due to conflicting information from the CRA and institutional administrations. For post-doctoral fellows, many of whom do not receive significant awards, this lack of clarity regarding their tax situation is stressful and untenable.

The National Graduate Caucus respectfully requests that the CRA delay the enactment of its decision to regard all post-doctoral fellow income as taxable until appropriate public consultations can taken regarding the implications of this decision on individual post-doctoral fellows. Such a postponement would also allow institutions the appropriate time to clarify their own policies, as well as avoiding conflicts with several provincial labour boards currently evaluating the employment status of post-doctoral fellows. Perhaps most importantly, such a delay would allow for consultations and action to be taken to ensure post-doctoral fellows, many of whom have young families, do not suffer a significant blow to their already small incomes.

In this regard, we also welcome the opportunity to meet with you to discuss this important matter.

Yours sincerely,

Graham H. Cox
Chairperson
National Graduate Caucus

April 16, 2009

Honourable Tony Clement
Minister of Industry
235 Queen Street
Ottawa, Ontario K1A 0H5
Canada

Honourable James Moore
Minister of Canadian Heritage and Official Languages
15 Eddy Street
Gatineau, Quebec K1A 0M5
Canada

Dear Ministers Clement and Moore,

I am writing you as a representative of the more than sixty-thousand members of the National Graduate Caucus of the Canadian Federation of Students who have serious concerns about the future of copyright legislation in Canada.

The unique position of students as creators, owners, and users of copyrighted material means they are particularly sensitive to any changes in copyright law. To maintain the standard of innovation Canada's post-secondary education system is renowned for, students require the right to access, create and build upon the works of others.

We would like to take this opportunity to call upon the federal government to listen to the will of Canadians by holding a series of open, public consultations on the future of copyright law in Canada.

Following broad consultations with our own membership, we strongly recommend the following amendments to the Copyright Act be included in any future legislation:

1. The inclusion of a more flexible and inclusive definition of Fair Dealing in the Copyright Act that enshrines the Supreme Court's recognition of the need for a careful balancing of interests between the rights of owners and the rights of users. This general approach would mean that complicated exceptions for educational institutions, such as those included in Bill C-61, would be unnecessary.
2. The regulation of technological protection measures so that they do not infringe upon a user's privacy or fair dealing rights. In particular, restrictions should not be placed upon a user's right to circumvent technology protection measures for purposes that do not infringe copyright.
3. A "Notice and Notice" provision that would only require Internet service providers to pass on allegations of infringements to the relevant individuals.
4. The elimination of statutory damages for those who are acting with the good-faith belief that their use of a work is justified by fair dealing. Because of their punitive nature, the very availability of statutory damages often acts as a constraint against the use of works for purposes of fair dealing.
5. The elimination of crown copyright. Government work is paid for by the Canadian public, so Canadians should not have to pay twice to access this work.

Students, as well as the rest of the Canadian public, are served by a Copyright Act that fairly balances the interests of users, creators, and owners of copyrighted works. It is only with such a balance that a robust information commons—a place where information and knowledge exist as our shared heritage—can thrive.

Sincerely,

Graham H. Cox
Chairperson
National Graduate Caucus
Canadian Federation of Students

Context and Executive Summary

This report provides an overview of the health of Canada's science, technology and innovation system. The report charts Canada's progress over time and compares Canadian performance to the performance of science, technology, and innovation leaders around the world. Finally, it identifies areas that deserve our attention if we aspire to position Canada in the leading group of innovating countries.

Innovation matters. In a globalized world, creating and retaining jobs for Canadians and improving our living standards will increasingly be linked to our ability to innovate. Our living standards and quality of life will rise with more energy efficient cars and airplanes, new treatments for diseases, better access to the Internet, and communication devices that connect us as communities and to the global economy. Our ability to tackle the issues important to Canadians — whether they be cleaner and more energy efficient use of our resources, or the ability to provide services across vast distances — will depend on a strong science base and a capacity to innovate.

While Canada's innovation potential is unbounded, there are challenges to face. The current global financial crisis has hurt our economic performance, particularly in the automotive, forest products, information technology and biotechnology sectors. It is reducing the revenues available to the private sector, universities, colleges and government.

At the same time we face longer-term challenges. Technological frontiers move outward at an accelerating pace, making it difficult to stay at the leading edge. Global and national challenges, such as climate change, energy consumption and production, and the costs and implications of an aging population, demand action. New, lower cost, entrants to the global economy increase competitive pressures on our companies.

The current economic environment has reduced the margin for error and increased the risk and consequences of poor decisions. In times of economic hardship, research and development (R&D) budgets can be squeezed in companies, universities, colleges and governments. Ensuring that our decisions and investments result in long-term, sustainable economic growth, however, remains urgent and vital to our future.

Canada has made progress in the last decade in supporting an innovation system. We now know that if we want to create jobs and opportunity in a competitive world, science, technology and innovation must be on a national agenda that focuses support on those who drive our innovation success. Drivers of our innovation success include:

- a private sector that has science, technology, and innovation strategies at its core;
- institutions of education and research that develop, recruit, and retain strong talent pools; and
- researchers who keep us at the forefront of knowledge and workers who see and act on opportunities to work smarter and more creatively.

We have learned that innovation performance comes from how well these performers do individually and how well they collaborate with each other. Stimulating innovation requires sustained collaboration and a systemic response by different individuals and institutions in the innovation system working together. Municipal, provincial and federal government funding, and policies act as incentives to innovative activity. Policies can also promote and ease international collaboration, strengthening access to the global pool of knowledge and expertise. Companies, institutions and governments must be strategic and nimble with their science and technology (S&T) investments and decision-making to capitalize on emerging technological shifts and new economic and societal opportunities.

Achieving excellence with a defined level of resources requires making choices. On the advice of the STIC, the Minister of Industry recently announced sub-priorities that will focus resources and support discovery and applied research and innovation that build on Canada's competitive advantages. This will lead to accelerated development of areas of importance to Canada while recognizing that a substantial proportion of funding is dedicated to excellent basic research.

Assessment and Way Forward

By comparing Canada's performance against other countries, there is much that we can learn about the dynamism of our economy, and our ability to maximize the economic and social benefits of new research, products, services, processes and business models. We have choices to make and strengths on which we can build. There are also areas where our performance is not among the world's best. This is natural. No country leads in everything. To get to the very top, we need to know where we are now, understand how we got here, agree and act on where we choose to excel, and then track our performance relentlessly.

Canada is having difficulty keeping pace with the best innovators. Our benchmarking with others and against our own performance over time shows a pattern of modest improvement, but the effort has been insufficient to bring Canada to the G-7 average, let alone position Canada as an international leader. Canada remains in the middle of the Organisation for Economic Co-operation and Development (OECD) pack of 30 countries and sixth in the G-7 in business R&D as a proportion of Gross Domestic Product (GDP). Low overall business R&D and commercialization in Canada has been a constant feature for 40 years.

There are some distinct Canadian characteristics worth observing. Canada has one of the most advantageous innovation tax incentives in the world providing between $3 and $4 billion in the form of the Scientific Research and Experimental Development (SR&ED) tax credit. Eighty percent of venture capital (VC) is used in the information, communications and technology and pharmaceutical industries. Public policy and business realities have made universities more important centres of R&D than in other countries.

[...] innovation is more than R&D.

At the same time, we need to emphasize that innovation is more than R&D. Many companies are bringing value to the market by using knowledge that does not necessarily come from R&D. We have significant limitations in measuring this type of innovation — that is knowledge gained through learning by doing and using and through collaboration outside the firm.

There will be profound changes in the North American and global economies in the coming years, reflecting changes to the industrial structure and the emergence of new economic realities. The best way for Canada to adapt to these changes, and even excel under these trying circumstances, is to ensure that our economy is flexible, efficient and dynamic. Shaking off complacency to achieve a more innovative Canadian economy will not only need a dedicated commitment of resources: it will require providing the right stimulus and incentives for innovation; fostering a business culture that sees innovation as a key driver of value; and enhancing the capacity of all elements of our innovation system to work together to create value for all Canadians.

The STIC examined sets of indicators that measure the performance of individuals, institutions and companies. Current indicators are not sufficient to the task. For example, we chose not to include a more detailed discussion of business R&D by sector, as conclusions would have been based on 2002 data, which were the most recent data available.

We know that innovation activities that result in new products and processes are reasonably well captured in data presented, but innovation that results in new business models, business practices or market development is not. This is a result of relatively infrequent surveys of innovation in services, manufacturing and in resource-based industries, and often, the difficulty in comparing international results by sector.

We are also limited in understanding the dynamics of collaboration. Our data allow us to count the number of collaborations by companies or public research institutions, but we know very little about the kinds of collaboration being done. We also do not know which collaborations have been successful and which have not, whether collaborations differ by industry, or the extent to which these collaborations involve only domestic companies or are global in nature. Many of the same challenges exist for international patent data, which is why data on patents have not been included in this report.

Much of the information that we need to analyze the profound changes in our economy will have to come through surveys of innovation plans, activities, linkages and outcomes. Surveys will need to be carried out with sufficient frequency to illuminate change. Businesses and governments need to think now about how official statistics are structured and compiled. They need information to help them assess the economic and social impacts of innovation. At the same time information must be collected in ways that minimize costs to respondents, particularly small and medium-sized businesses.

If Canadian research and entrepreneurship are conducted at international levels of excellence, they will continue to be a source of national pride and prosperity.

Canada has a proud history of scientists who pushed back the frontiers of knowledge to benefit humankind. Canadians have made groundbreaking discoveries and turned scientific discoveries into the products and services that make our lives better. Just as we prepare our athletes to be the best, we must enable our scientists and entrepreneurs to learn by working and competing with the best. If Canadian research and entrepreneurship are conducted at international levels of excellence, they will continue to be a source of national pride and prosperity.

To move forward we recommend devoting attention to the following areas:

Talent — developing a highly qualified workforce attuned to innovation opportunities

- Young Canadians are excelling in science, mathematics and reading in comparison to their peers in the OECD, ranking in the top five in each of these categories. We must keep up with others who are improving their rankings.
- In comparison to those in other OECD countries, few Canadian students are completing Master's and Doctoral programs in areas that drive discovery and innovation. Companies, governments, and universities can encourage more Canadians to complete advanced degrees by educating students on the range of S&T careers and providing students with career opportunities in S&T development, application, management and financing.
- Canadians in the workplace who apply and adapt new technologies can drive innovation to new levels. Canada has not made progress in a decade in increasing the proportion of Canadians with basic literacy and numeracy skills. Governments and employers must champion adult literacy and technology training to address this skills deficit.

Knowledge development and transfer

- In Canada, governments at different levels and the private sector have chosen to build research capacity at institutions of higher learning. Focusing resources of all sectors on research priorities, conducting research at international levels of excellence and better using research facilities at universities and colleges to train students in state-of-the-art facilities can help improve innovation performance and benefit companies.
- Turning R&D excellence into jobs and a better quality of life depends on building strong connections among customers and suppliers, scientists and managers and managers and teachers. We need to advance the transfer of knowledge between science and business.

Business Innovation

- Canadian companies do not invest as much as their competitors around the world in R&D. We have made little progress in understanding why these competitors are more likely to see investments in the lab and on the shop floor as contributing to their business goals. This understanding is fundamental to evaluating the efficacy of policy instruments to stimulate innovation.
- How Canadian technology companies finance their ventures and the availability of different sources of risk capital at different stages of business development can have a significant impact on commercialization success. Business associations and the venture capital industry can assist in the understanding of this area.

Tracking Progress

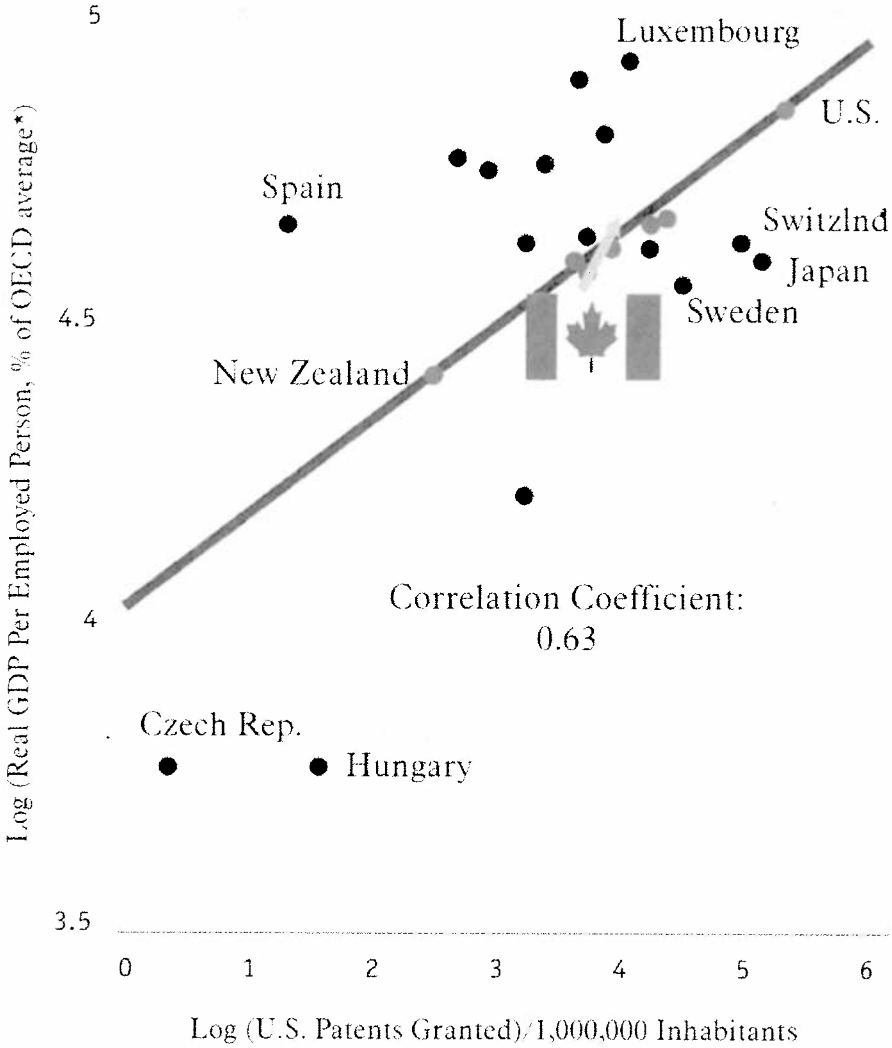
- More resources and greater effort must be devoted within the innovation system to capturing data, which better explain how individuals, companies and other institutions innovate. This can be done through business R&D and innovation surveys, sector specific technology surveys and user surveys on information technologies and their applications. Without the tools to understand how innovation happens, we will be unable to formulate appropriate strategies for improving innovation performance.

Conclusion

All participants in the innovation system have a role to play in strengthening Canada's innovation capabilities. In the STIC's view, Canada has strong foundations on which to build. Many Canadians are leading the way with the support of all levels of government. If we adapt international best practices for Canada, focus our domestic efforts, maintain a watch on key indicators for success, relentlessly test the efficacy of our innovation support mechanisms, and act quickly to address areas of weakness Canada will be able to compete with the best.

Figure 1:

Real GDP Per Employed Person* and Patents per Capita Granted in the U.S. for OECD Countries, 1995



* OECD average is a weighted average based on 1996 PPPs.
Source: Industry Canada compilations based on data from OECD and U.S. Patent and Trademark Office.

From: Rao, S.; Ahmad, A.; Horsman, W. & Kaptein-Russell, P. The Importance of Innovation for Productivity International Productivity Monitor, 2001, 2, 11-18

This illustrates that after the influence of industrial structure is removed, Canada's overall BERD intensity increases a little, but we actually drop in the adjusted OECD BERD intensity rankings. In 2002, using a country specific industry structure (i.e. how the OECD normally reports these data) Canada's BERD intensity was 1.6 percent — good enough to rank 12th in the OECD that year. Weighing Canada's BERD expenditures using an "average OECD industry structure," our BERD intensity, according to the Australian government's Productivity Commission, was 1.9 percent, but we dropped to 13th in the adjusted OECD BERD intensity rankings.

The trend in BERD intensity is downward since 2002. While total BERD dipped slightly in 2002 and 2003 from 2001 levels, by 2004 they had recovered to be greater than 2001 levels, and have increased slowly since then. However, the rise in total BERD in Canada has not kept pace with GDP growth, which is why BERD intensity is down since 2002.

Percentage of Total Research and Development Performed by Business

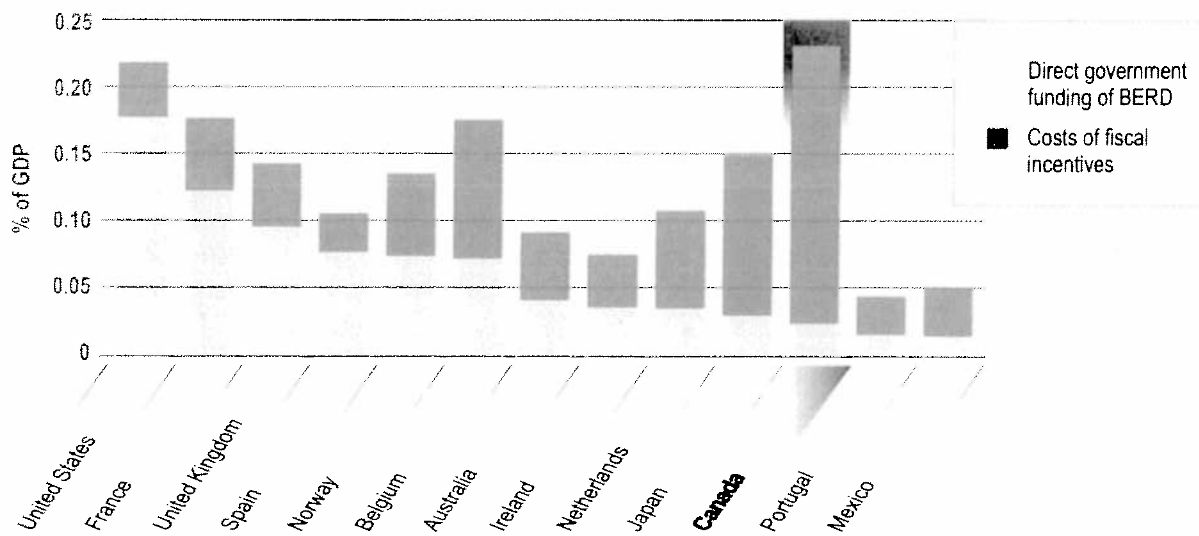
It is evident that compared to other OECD countries, business R&D in Canada is a comparatively smaller portion of total R&D performed by all sources (i.e. the gross expenditure on R&D [GERD]). In 2006, Canada's business sector performed 55 percent of all R&D, compared to: 77 percent in Japan; 70 percent in the U.S. and Germany; 63 percent in France; and 62 percent in the U.K.[39]

R&D is therefore performed to a much greater degree by the business sector in other countries. Since the R&D performed by business is more likely to be *closer to the market* (i.e. more *development* than *research*) this may have an impact on Canada's ability to turn research into new products, services, processes and business models that are sold globally. Compared to our major competitors, more of our R&D is performed by universities and colleges. Most of this is more basic research, farther away from being turned into profitable market opportunities and results.

Government Support of Business Research and Development

Governments at different levels in Canada encourage business R&D. Federal and provincial governments provide assistance through government programs and arm's-length foundations. The May 2007 Government of Canada S&T Strategy, *Mobilizing Science and Technology to Canada's Advantage*, suggested that aligning federal programs and activities could result in more effective support. The OECD has begun to compare total direct versus indirect support by government of business R&D for some countries. This work in Figure 8 shows that when direct support is added to the value of indirect support of business R&D, for the 13 OECD countries for which data are available, Canada has the richest government support of business R&D, as a percentage of GDP, just edging out the U.S.

Figure 8: Direct and Indirect Government Funding of Business R&D and Tax Incentives for R&D (2005 or Latest Available Year)



Source: OECD, based on national estimates (NESTI R&D tax incentives questionnaire), some of which may be preliminary.

[39] OECD, Main Science and Technology Indicators, 2008/1

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Rights

The European Charter for Researchers

The European Charter for Researchers is a set of general principles and requirements which specifies the roles, responsibilities and entitlements of researchers as well as of employers and/or funders of researchers[6]. The aim of the Charter is to ensure that the nature of the relationship between researchers and employers or funders is conducive to successful performance in generating, transferring, sharing and disseminating knowledge and technological development, and to the career development of researchers. The Charter also recognizes the value of all forms of mobility as a means for enhancing the professional development of researchers.

In this sense, the Charter constitutes a framework for researchers, employers and funders which invites them to act responsibly and as professionals within their working environment, and to recognise each other as such.

The Charter addresses all researchers in the European Union at all stages of their career and covers all fields of research in the public and private sectors, irrespective of the nature of the appointment or employment[7], the legal status of their employer or the type of organisation or establishment in which the work is carried out. It takes into account the multiple roles of researchers, who are appointed not only to conduct research and/or to carry out development activities but are also involved in supervision, mentoring, management or administrative tasks.

This Charter takes as its premise that researchers as well as employers and/or funders of researchers have an overriding obligation to ensure that they meet the requirements of the respective national or regional legislation. Where researchers enjoy a status and rights which are, in certain respects, more favourable than those provided for in this Charter, its terms should not be invoked to diminish the status and rights already acquired.

Researchers, as well as employers and funders, who adhere to this Charter will also be respecting the fundamental rights and observe the principles recognised by the Charter of Fundamental Rights of the European Union[8]

6. See definition in Section 3.
7. See definition in Section 3.
8. Official Journal C 364, 18.12.2000 p. 0001-0022.

EUROPEAN COMMISSION

The European Charter for Researchers

The Code of Conduct for the Recruitment of Researchers

2005

Directorate-General for Research
Human resources and mobility (Marie Curie Actions)

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Commission Recommendation of 11 March 2005 on the European Charter for Researchers and on a Code of Conduct for the Recruitment of Researchers

The Commission of the European Communities

Having regard to the Treaty establishing the European Community, and in particular Article 165 thereof

Whereas

(1) The Commission considered it necessary in January 2000 [1] to establish the European Research Area as the linchpin of the Community's future action in this field with a view to consolidating and giving structure to a European research policy.

(2) The Lisbon European Council set the Community the objective of becoming the most competitive and dynamic knowledge economy in the world by 2010.

(3) The Council has addressed issues related to the profession and the career of researchers within the European Research Area in its Resolution of 10 November 2003 [2] and welcomed in particular the Commission's intention to work towards the development of a European Researcher's Charter and a Code of Conduct for the Recruitment of Researchers.

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1 COM(2000) 6 final of 18.1.2000.

2 JO C 282, p. 1-2, of 25.11.2003. Council Resolution of 10 November 2003 (2003/C 282/01 on the profession and the career of researchers within the European Research Area).

(4) The identified potential shortage of researchers [3], particularly in certain key disciplines, will pose a serious threat to EU's innovative strength, knowledge capacity and productivity growth in the near future and may hamper the attainment of the Lisbon and Barcelona objectives. Consequently, Europe must dramatically improve its attractiveness to researchers and strengthen the participation of women researchers by helping to create the necessary conditions for more sustainable and appealing careers for them in R&D [4].

(5) Sufficient and well-developed human resources in R&D are the cornerstone of advancement in scientific knowledge, technological progress, enhancing the quality of life, ensuring the welfare of European citizens and contributing to Europe's competitiveness.

(6) New instruments for the career development of researchers should be introduced and implemented, thus contributing to the improvement of career prospects for researchers in Europe.

(7) Enhanced and more visible career prospects also contribute to the building of a positive public attitude towards the researchers' profession, and thereby encourage more young people to embark on careers in research.

(8) The ultimate political goal of this Recommendation is to contribute to the development of an attractive, open and sustainable European labour market for researchers, where the framework conditions allow for recruiting and retaining high quality researchers in environments conducive to effective performance and productivity.

(9) Member States should endeavour to offer researchers sustainable career development systems at all career stages, regardless of their contractual situation and of the chosen R&D career path, and they

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3 COM (2003) 226 final and SEC(2003) 489 of 30.4.2003.

4 SEC (2005) 260.

should endeavour to ensure that researchers are treated as professionals and as an integral part of the institutions in which they work.

(10) Even though Member States have made considerable efforts to overcome administrative and legal obstacles to geographical and intersectoral mobility, many of these obstacles still remain.

(11) All forms of mobility should be encouraged as part of a comprehensive human resource policy in R&D at national, regional and institutional level.

(12) The value of all forms of mobility needs to be fully recognised in the career appraisal and career advancement systems for researchers, thus guaranteeing that such an experience is conducive to their professional development.

(13) The development of a consistent career and mobility policy for researchers to [5] and from the European Union should be considered with regard to the situation in developing countries and regions within and outside Europe, so that building research capacities within the European Union does not occur at the expense of less developed countries or regions.

(14) Funders or employers of researchers in their role as recruiters should be responsible for providing researchers with open, transparent and internationally comparable selection and recruitment procedures.

(15) Society should appreciate more fully the responsibilities and the professionalism that researchers demonstrate in executing their work at different stages of their careers and in their multi-faceted role as knowledge workers, leaders, project coordinators, managers, supervisors, mentors, career advisors or science communicators.

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5 COM(2004) 178 final of 16.3.2004.

(16) This Recommendation takes as its premise that employers or funders of researchers have an overriding obligation to ensure that they meet respective national, regional or sectoral legislation requirements.

(17) This Recommendation provides Member States, employers, funders and researchers with a valuable instrument to undertake, on a voluntary basis, further initiatives for the improvement and consolidation of researchers' career prospects in the European Union and for the creation of an open labour market for researchers.

(18) The general principles and requirements outlined in this Recommendation are the fruits of a public consultation process to which the members of the Steering Group on Human Resources and Mobility have been fully associated,

Hereby recommends:

1. That Member States endeavour to undertake the necessary steps to ensure that employers or funders of researchers develop and maintain a supportive research environment and working culture, where individuals and research groups are valued, encouraged and supported, and provided with the necessary material and intangible support to enable them to fulfil their objectives and tasks. Within this context, particular priority should be given to the organisation of working and training conditions in the early stage of the researchers' careers, as it contributes to the future choices and attractiveness of a career in R&D.

2. That Member States endeavour to take, wherever necessary, the crucial steps to ensure that employers or funders of researchers improve the recruitment methods and career evaluation/appraisal systems in order to create a more transparent, open, equal and internationally accepted system of recruitment and career development as a prerequisite for a genuine European labour market for researchers.

3. That Member States - as they formulate and adopt their strategies and systems for developing sustainable careers for researchers - take duly into account and are guided by the general principles and requirements, referred to as The European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers outlined in the Annex.

4. That Member States endeavour to transpose these general principles and requirements within their area of responsibility into national regulatory frameworks or sectoral and/or institutional standards and guidelines (charters and/or codes for researchers). In so doing they should take into account the great diversity of the laws, regulations and practices which, in different countries and in different sectors, determine the path, organisation and working conditions of a career in R&D.

5. That Member States consider such general principles and requirements as an integral part of institutional quality assurance mechanisms by regarding them as a means for establishing funding criteria for national/regional funding schemes, as well as adopting them for the auditing, monitoring and evaluation processes of public bodies.

6. That Member States continue their efforts to overcome the persisting legal and administrative obstacles to mobility, including those related to intersectoral mobility and mobility between and within different functions, taking into account an enlarged European Union.

7. That Member States endeavour to ensure that researchers enjoy adequate social security coverage according to their legal status. Within this context, particular attention should be paid to the portability of pension rights, either statutory or supplementary, for researchers moving within the public and private sectors in the same country and also for those moving across borders within the European Union. Such regimes should guarantee that researchers who, in the course

of their lives, change jobs or interrupt their careers do not unduly suffer a loss of social security rights.

8. That Member States put in place the necessary monitoring structures to review this Recommendation regularly, as well as to measure the extent to which employers, funders and researchers have applied the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers.

9. That the criteria for measuring this will be established and agreed with the Member States within the context of the work undertaken by the Steering Group on Human Resources and Mobility.

10. That Member States in their role as representatives in the international organisations established at intergovernmental level take due account of this Recommendation when proposing strategies and taking decisions concerning the activities of those organisations.

11. This Recommendation is addressed to the Member States but it is also intended as an instrument to encourage social dialogue, as well as dialogue among researchers, stakeholders and society at large.

12. The Member States are invited to inform the Commission, as far as possible, by 15th December 2005 and annually thereafter of any measures they have taken further to this Recommendation, and to inform it of the first results of its application as well as to provide examples of good practice.

13. This Recommendation will be reviewed periodically by the Commission in the context of the Open Method of Coordination.

Done at Brussels, 11 March 2005

For the Commission
Janez Potočnik
Member of the Commission

DRAFT - Health Research Roadmap: creating innovative research for better health and healthcare

CIHR's Strategic Plan 2009/10 - 2013/14

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Foreword

CIHR is unveiling its second strategic plan during a period of unprecedented uncertainty. It has, therefore, been particularly rewarding to see the widespread conviction on both sides of the 49th parallel that investment in research is a vital part of stimulating our economy and our society back to a state of prosperity and of our future growth and competitiveness.

We are building on a solid foundation with this plan. CIHR's first almost-full decade of accomplishments has energized the health-research community, inspired new collaborations across disciplinary and geographic boundaries and engendered new partnerships among those who conduct research and those who implement its findings.

Second, through its Science & Technology Strategy, *Mobilizing Science and Technology to Canada's Advantage*, the Government of Canada has signalled its recognition of the centrality of science and technology - and of the highly skilled individuals who bring innovation to life - to securing Canada's national competitive advantage. And, in its designation of health and related life sciences and technologies of one of the four areas of research strength, the Government has also signalled its understanding of the importance of health research to the health of Canadians and to the maintenance of our health care system.

Health research, ultimately is about making people healthier. But while there is one ultimate outcome, there are many paths to reaching that outcome. It may be through the development of new and better ways to prevent, diagnose and treat disease. It may be through providing the evidence that supports the delivery of the health services Canadians need, when and where they need them. And it may be through the commercialization of a health research discovery, making a new product or service available in the marketplace.

CIHR supports all of these paths to better health. This Strategic Plan - *Health Research Roadmap: creating innovative research for better health and healthcare* - is the product of widespread consultations with members of the health research community, careful assessment of CIHR's strengths and weaknesses, ongoing deliberation about where CIHR would like to be in five years and a sober assessment of the resources available to get us there.

It sets out four strategic directions that will help to achieve CIHR's goals while aligning it with the S&T Strategy. These strategic directions will enable CIHR to carry out its full mandate, in all of its complexity; to show leadership within the wider health research community; and to demonstrate accountability and results to the people of Canada. Annual implementation plans will give us the flexibility to adapt to changing circumstances while reporting on our accomplishments.

I would like to thank all of those who contributed to the development of this Strategic Plan, and I look forward with working with all members of Canada's health research community in its implementation.

Alain Beaudet,
President
Canadian Institutes of Health Research

About CIHR

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Mandate

The mandate of CIHR is to excel, according to internationally accepted standards of scientific excellence, in the creation of new knowledge and its translation into improved health for Canadians, more effective health services and products and a strengthened Canadian health care system (Bill C-13, April 13, 2000).

Vision

CIHR's vision is to position Canada as a world leader in the creation and use of knowledge through health research that benefits Canadians and the global community.

Achieving the mandate and vision

Established in 2000, CIHR promotes a problem-based, multidisciplinary and collaborative approach to health research. Its unique structure brings together researchers from across disciplinary and geographic boundaries through its 13 virtual Institutes. All of CIHR's investments support research ideas originating from health researchers, who, more than ever, are working in collaboration with one another and with research users to find and apply solutions to national and global health problems. Currently, CIHR supports nearly 12,000 health researchers and trainees in universities, teaching hospitals and other health organizations and research centres across the country. The agency supports health research in an open process that meets the highest international standards of excellence and ethics in four research areas: biomedical; clinical; health systems and services; and the social, cultural and environmental factors that affect the health of populations.

Institutes

CIHR's 13 Institutes share responsibility for achieving the fundamental objective of CIHR and have their own distinct strategic plans that are aligned with the overarching directions, mandate and vision of CIHR. The Institutes promote and build upon Canada's firm foundation of research excellence, engage the research community and encourage interdisciplinary, integrative health research. Through their Scientific Directors and Institute Advisory Boards and under the oversight and guidance of CIHR's Governing Council, they work together to forge a health research agenda across disciplines, sectors, and regions that embraces scientific opportunity and reflects the emerging health needs of Canadians, the evolution of the health care system and the information needs of health policy decision-makers. They facilitate partnerships and work to accelerate the uptake of new knowledge to create benefits for Canadians.

CIHR's 13 institutes
Aboriginal Peoples' Health Aging Cancer Research Circulatory and Respiratory Health Gender and Health Genetics Health Services and Policy Research Human Development, Child and Youth Health Infection and Immunity Musculoskeletal Health and Arthritis Neurosciences, Mental Health and Addiction Nutrition, Metabolism and Diabetes Population and Public Health

CIHR's values

To assure Canadians that their investments in health research are wisely used, CIHR embraces values that permeate all aspects of the organization's activities and relationships with others. These core values are:

- **Excellence** -- In all aspects of the work undertaken by CIHR, including research, knowledge translation and organizational services, CIHR strives to meet the highest international standards of excellence.

- **Scientific Integrity and Ethics** - CIHR upholds and promotes adherence to relevant research and organizational principles with utmost honesty, probity and professionalism. CIHR believes that excellent research, knowledge application and good governance require the development and application of sound ethical principles and processes.

- **Collaboration** - CIHR promotes, encourages and values collaboration among researchers in Canada. CIHR engages, collaborates and coordinates research activities with federal and provincial/territorial governments and departments and private-sector organizations. CIHR is committed to openness, responsibility, fairness and mutual respect with all its researchers and partners. CIHR cannot fulfill its mandate without the collaboration and support of partners across Canada.

- **Innovation** -- CIHR values new ideas and creative approaches to addressing health and health system challenges in Canada and worldwide.

- **Public Interest** - The public interest is of paramount importance in the creation and use of health knowledge through all research and related activities supported by CIHR.

About this Strategic Plan

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CIHR's first Strategic Plan -- *Investing in Canada's Future: CIHR's Blueprint for Health Research and Innovation* -- articulated CIHR's vision, mandate and strategic directions for the period 2003-2008. It was designed to build on the organization's significant achievements in its first four years and was an important step in defining CIHR's long-term strategy of becoming Canada's main engine for supporting health research discovery and innovation.

The foundation of CIHR's Blueprint was the extensive work of CIHR's 13 Institutes in developing their own strategic plans. This included wide-ranging consultations with a variety of stakeholders to identify research needs and priorities and to contribute to the development of Canada's first national health research agenda. In addition, CIHR conducted national consultations in 2003 to gain direct input from health researchers and other stakeholders across the country.

CIHR is now entering a new chapter in its history and as such it is appropriate to review, renew and reinvigorate CIHR's Strategic Plan. This renewed plan position CIHR as a research leader (domestically & internationally) in health research well into the 21st century.

The health research community has been an integral part of the development of this strategic plan. In fact, CIHR's President has conducted numerous university campus visits and stakeholder meetings. Through these meetings, he was able to hear and witness first-hand the accomplishments, progress and needs of the health research community.

This strategic plan was also supported by CIHR's Scientific and Governing Councils. Both Councils provided their guidance, leadership and recommendations to help make this strategic plan what it is today. The strategic plan is divided into four strategic directions: (1) investing in world-class excellence; (2) addressing health and health system research; (3) accelerating the capture of health and economic benefits of health research; and (4) achieving organizational excellence, fostering ethics and demonstrating impact.

To help ensure the uptake of each strategic direction, an accompanying implementation plan was created to provide specific targets that will be measured and updated on an annual basis. This implementation plan will enable all 13 Institutes to align their initiatives with the four identified strategic directions of CIHR. In addition, the implementation plan is expected to further provide the research community and the general public with an opportunity to assess the impacts and results of the specific initiatives undertaken. Moving forward, additional stakeholder meetings and campus visits will take place to further ensure that the strategic plan meets its desired expectations and outcomes.

Guiding principles

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Four over-arching principles guided the strategic planning process:

1. Address the full CIHR mandate

In its review of progress for the strategic planning process, Governing Council noted the efforts made to achieve excellence in knowledge creation while acknowledging that much more needs to be done to address the knowledge translation aspect of CIHR's mandate.

2. Adhere to the Federal S&T Strategy

The Federal Science and Technology Strategy, *Mobilizing Science and Technology to Canada's Advantage* (S&T Strategy), recognizes that Canada's national competitive advantage is based on science and technology and the highly skilled individuals whose talent brings innovations to life. It commits the Government of Canada to maintaining Canada's G-7 leadership in public-sector R&D performance. Health and related life sciences and technologies are one of the four areas of research strength identified in the S&T Strategy. The principles and directions of the S&T Strategy are consistent with CIHR's overall strategic directions. The Strategy emphasizes three Canadian advantages:

a. *Entrepreneurial Advantage* -- translates knowledge into practical applications that are applied/used/adopted;
b. *Knowledge Advantage* - generates new ideas and builds research excellence; and
c. *People Advantage* - increases and retains the highly skilled individuals that Canada needs to thrive in the global economy.

Over the next five years, CIHR will continue to strengthen its alignment with the Strategy.

3. Develop fully CIHR's leadership and convenor role

CIHR is responsible for "forging an integrated health research agenda across disciplines, sectors and regions that reflects the emerging health needs of Canadians and the evolution of the health system and supports health policy decision-making" (*CIHR Act*). This task cannot be accomplished without the collaboration and support of various partners across the country working closely with CIHR and its 13 virtual institutes.. CIHR's partnership practices will be enhanced to ensure that they support and promote health research and knowledge translation activities in this way. In particular, Governing Council emphasized the importance of partnering with the provinces in finding research-based solutions to health and health system delivery challenges.

4. Manage risk and accountability

Governing Council noted that forward planning must proceed under the assumption of modest future budgetary growth. This assumption is important given the global economic downturn. Governing Council indicated that the rationale for existing programs, and their resource levels. will be challenged and must be able to withstand the toughest scrutiny. Efforts must focus on establishing fewer priorities. streamlining opportunities, and leveraging funding from other sources. This does not imply that CIHR will limit its investments to a few large initiatives - rather. CIHR will work smart, align its opportunities to maximize gains and build on existing foundations. Smaller-scale projects will continue to be the foundation of much of CIHR's activities. Governing Council finally noted that further efforts to enhance the transparency of decision making and accountability for results are required.

Context for strategic planning

Top of Page

Health advances and challenges

Sustained government investments in health research in recent years have enabled Canada to capitalize on important health discoveries and advancements in knowledge. These investments helped secure Canada's place on the global stage in such areas as HIV/AIDS, cancer, cardiovascular and respiratory health, neurosciences, diabetes and infectious diseases and immunity. Yet there remain many health-related issues that require further research attention. For example, First Nations, Inuit and Métis peoples along with many other vulnerable populations continue to struggle with critical health issues, including infectious disease, chronic disease, mental health and access to health services and the social and economic conditions required for healthy living. The threat of pandemic flu and viral outbreaks has reinforced that health challenges have no boundaries in today's global world, placing more impetus on greater international collaboration in health research and surveillance. Chronic conditions such as heart disease, cancer, diabetes, obesity, asthma, allergy and arthritis, as well as mental illness, addiction and substance abuse, continue to plague millions of people around the world. Many of these conditions will be magnified by our aging population. Global warming and climate change may already be having significant health and economic consequences; Canada's research community, including health researchers, must mobilize to better understand the numerous consequences and implications for today and tomorrow in order to mitigate its impacts.

Effectively addressing these health issues is yet a greater challenge given the world economic recession. While the North American manufacturing sectors have sustained significant losses of revenue and employment, the impact of the recession on the health research community is also significant, with many resource and research opportunities lost. The recession furthermore increases pressure on Canada's research community and funding agencies to demonstrate value for money.

Demonstrating research impact is not a simple task, especially as the translation of discoveries into treatments and policy changes can often take years. This 'lagtime' challenge is further complicated by: Canada's large geography, low population density, complex political structure and health system and diverse health research landscape. These national challenges make it difficult to build the critical mass of scientific talent, business expertise and capital necessary for speed and impact.

Yet, while the pressures on the research community to demonstrate immediate impact are undeniable, both the Canadian and American governments recognize that, in order to build momentum and ensure future economic sustainability, they must invest not only in the traditional economies, but also in the new economies - the knowledge economies where science and innovation will be key to their competiveness. As a result, the 2009 American stimulus package contained $8.2 billion for the National Institutes of Health. This commitment will provide new international opportunities for collaboration with Canada and energize the North American health research community. In Canada, research investments have gradually increased since 2000, culminating in the January 2009 budget, which invested $5.1 billion in the Government's Science and Technology (S&T) Strategy envelope. This included an additional $85 million to support the next generation of researchers through the Canada Graduate Scholarship program. Today, Canada's health researchers have both an individual and community responsibility to ensure that public investments in research are making a difference in the lives of Canadians and the future of our country.

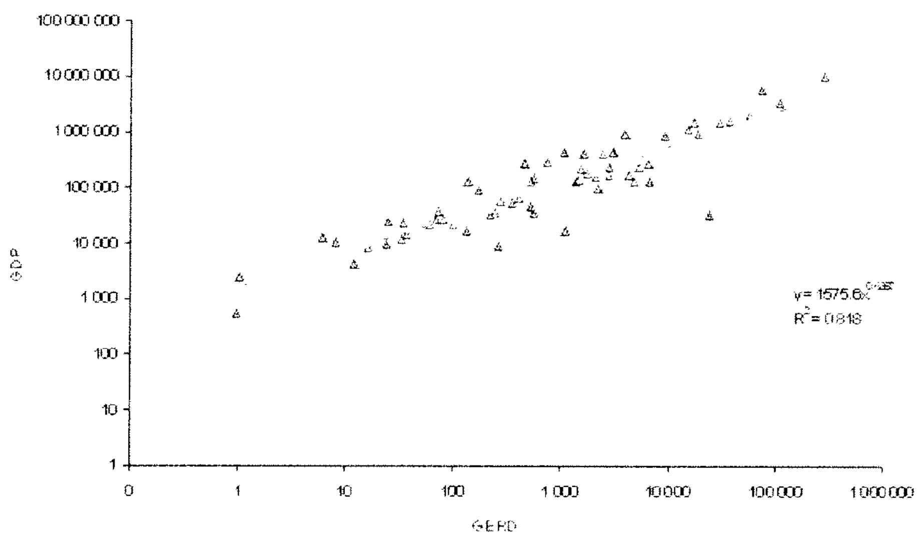
Example of Successful Partnership - Cancer Stem Cell Consortium
CIHR, the Government of Canada, Genome Canada, the Ontario Institute of Cancer Research and the Canada Foundation for Innovation together make up Canada's Cancer Stem Cell Consortium (CSCC). The CSCC recently established a partnership with the Califomia Institute for Regenerative Medicine for international collaboration to advance cancer stem cell research, committing $30M over 5 years to the $200M initiative.

Health research as a lever for better health and a stronger economy

Research and development have long been recognized as potent motors of the economy. As seen in Figure 1, the gross domestic product (GDP) is directly correlated with R&D investments. The total spending in Canada on research and development in the health field was estimated at $6.6 billion in 2006, up 6.8 per cent from the previous year.[2] The majority of R&D activities are performed in university settings (63 per cent of all R&D in the health field, representing an estimated $4.1 billion.)[3] As such, it has been a long-standing federal policy to build a knowledge-based economy through public-sector R&D investments.

Figure 1

Correlation between Gross Domestic Product and R&D Investments



Canada has a strong presence in the amount of R&D performed by its postsecondary institutions ranking 2nd of the OECD countries. Furthermore, Canada is among the top ten countries in terms of the number of health sciences papers by Gross Domestic Product (GDP) measured in billions of dollars (Figure 2).

Figure 2

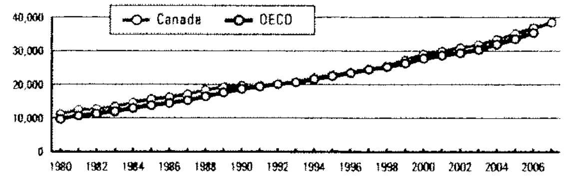
Health Sciences papers by (GDP) measured in billions of dollars

Canada

Key indicators

Total population (millions), 2007 .... 32.9
GDP (US$ billions), 2007 .... 1,432.1
GDP per capita (US$), 2007 .... 43,484.9
GDP (PPP) as share (%) of world total, 2007 .... 1.96

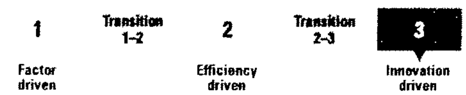
GDP (PPP US$) per capita, 1980–2007

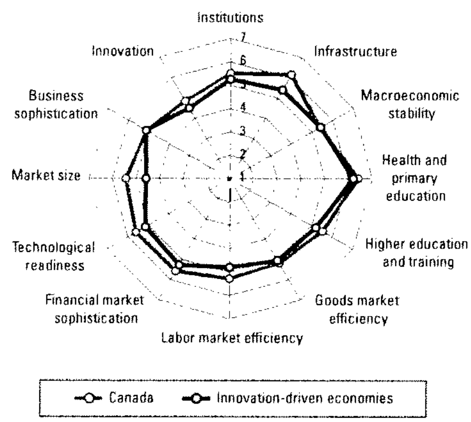


Global Competitiveness Index

	Rank (out of 134)	Score (1–7)
GCI 2008–2009	**10**	**5.4**
GCI 2007–2008 (out of 131)	13	5.3
GCI 2006–2007 (out of 122)	12	5.4
Basic requirements	**8**	**5.8**
1st pillar: Institutions	15	5.5
2nd pillar: Infrastructure	6	6.1
3rd pillar: Macroeconomic stability	43	5.4
4th pillar: Health and primary education	6	6.4
Efficiency enhancers	**5**	**5.4**
5th pillar: Higher education and training	9	5.5
6th pillar: Goods market efficiency	16	5.2
7th pillar: Labor market efficiency	7	5.3
8th pillar: Financial market sophistication	10	5.6
9th pillar: Technological readiness	9	5.6
10th pillar: Market size	14	5.4
Innovation and sophistication factors	**16**	**5.0**
11th pillar: Business sophistication	18	5.1
12th pillar: Innovation	13	4.8

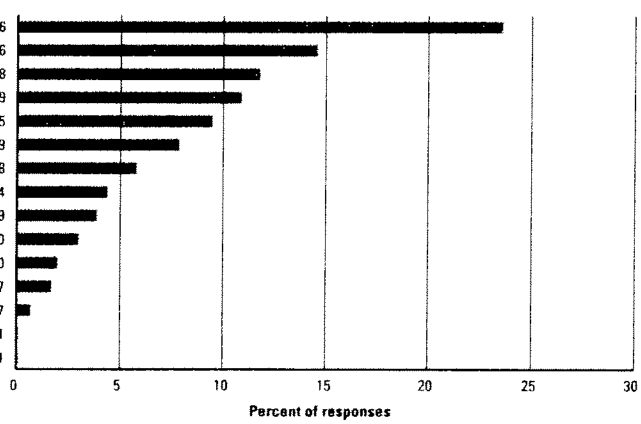
Stage of development





The most problematic factors for doing business

Tax rates	23.6
Tax regulations	14.6
Inefficient government bureaucracy	11.8
Access to financing	10.9
Restrictive labor regulations	9.5
Inadequately educated workforce	7.9
Inadequate supply of infrastructure	5.8
Policy instability	4.4
Inflation	3.9
Poor work ethic in national labor force	3.0
Poor public health	2.0
Foreign currency regulations	1.7
Corruption	0.7
Government instability/coups	0.1
Crime and theft	0.1



Note: From a list of 15 factors, respondents were asked to select the five most problematic for doing business in their country and to rank them between 1 (most problematic) and 5. The bars in the figure show the responses weighted according to their rankings.

Canada

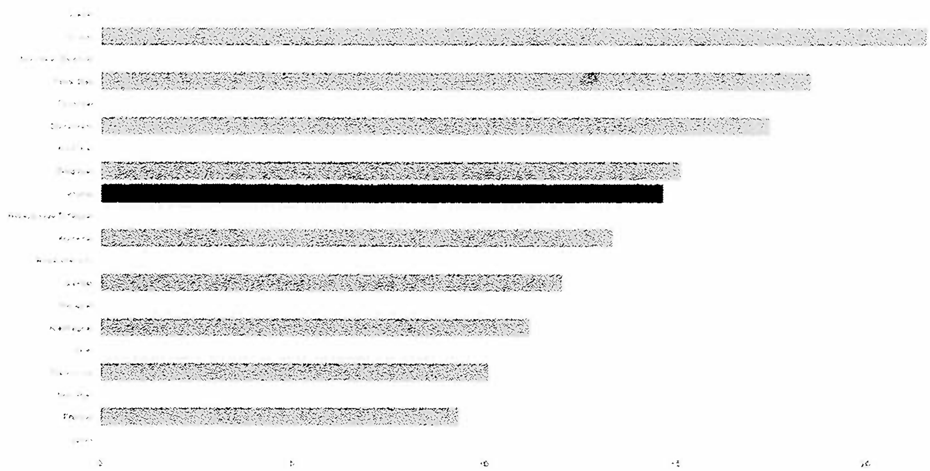
The Global Competitiveness Index in detail

■ Competitive **Advantage** ▨ Competitive **Disadvantage**

	INDICATOR	RANK/134	
	1st pillar: Institutions		
1.01	Property rights	8	■
1.02	Intellectual property protection	19	▨
1.03	Diversion of public funds	18	▨
1.04	Public trust of politicians	24	▨
1.05	Judicial independence	9	■
1.06	Favoritism in decisions of government officials	24	▨
1.07	Wastefulness of government spending	32	▨
1.08	Burden of government regulation	40	▨
1.09	Efficiency of legal framework	14	▨
1.10	Transparency of government policymaking	16	▨
1.11	Business costs of terrorism	73	▨
1.12	Business costs of crime and violence	41	▨
1.13	Organized crime	38	▨
1.14	Reliability of police services	9	■
1.15	Ethical behavior of firms	12	▨
1.16	Strength of auditing and reporting standards	10	■
1.17	Efficacy of corporate boards	11	▨
1.18	Protection of minority shareholders' interests	9	■
	2nd pillar: Infrastructure		
2.01	Quality of overall infrastructure	10	■
2.02	Quality of roads	10	■
2.03	Quality of railroad infrastructure	15	▨
2.04	Quality of port infrastructure	14	▨
2.05	Quality of air transport infrastructure	17	▨
2.06	Available seat kilometers*	9	■
2.07	Quality of electricity supply	15	▨
2.08	Telephone lines*	3	■
	3rd pillar: Macroeconomic stability		
3.01	Government surplus/deficit*	44	▨
3.02	National savings rate*	61	▨
3.03	Inflation*	26	▨
3.04	Interest rate spread*	46	▨
3.05	Government debt*	107	▨
	4th pillar: Health and primary education		
4.01	Business impact of malaria	14	▨
4.02	Malaria incidence*	1	■
4.03	Business impact of tuberculosis	21	▨
4.04	Tuberculosis incidence*	3	■
4.05	Business impact of HIV/AIDS	38	▨
4.06	HIV prevalence*	74	▨
4.07	Infant mortality*	26	▨
4.08	Life expectancy*	5	■
4.09	Quality of primary education	6	■
4.10	Primary enrollment*	6	■
4.11	Education expenditure*	35	▨
	5th pillar: Higher education and training		
5.01	Secondary enrollment*	6	■
5.02	Tertiary enrollment*	24	▨
5.03	Quality of the educational system	8	■
5.04	Quality of math and science education	13	▨
5.05	Quality of management schools	4	■
5.06	Internet access in schools	13	▨
5.07	Local availability of research and training services	10	■
5.08	Extent of staff training	19	▨
	6th pillar: Goods market efficiency		
6.01	Intensity of local competition	23	▨
6.02	Extent of market dominance	18	▨
6.03	Effectiveness of anti-monopoly policy	16	▨
6.04	Extent and effect of taxation	88	▨
6.05	Total tax rate*	72	▨
6.06	No. of procedures required to start a business*	1	■
6.07	Time required to start a business*	2	■
6.08	Agricultural policy costs	45	▨
6.09	Prevalence of trade barriers	38	▨
6.10	Trade-weighted tariff rate*	36	▨
6.11	Prevalence of foreign ownership	34	▨
6.12	Business impact of rules on FDI	45	▨
6.13	Burden of customs procedures	25	▨
6.14	Degree of customer orientation	15	▨
6.15	Buyer sophistication	14	▨
	7th pillar: Labor market efficiency		
7.01	Cooperation in labor-employer relations	34	▨
7.02	Flexibility of wage determination	24	▨
7.03	Non-wage labor costs*	46	▨
7.04	Rigidity of employment*	6	■
7.05	Hiring and firing practices	30	▨
7.06	Firing costs*	50	▨
7.07	Pay and productivity	31	▨
7.08	Reliance on professional management	11	▨
7.09	Brain drain	20	▨
7.10	Female participation in labor force*	22	▨
	8th pillar: Financial market sophistication		
8.01	Financial market sophistication	6	■
8.02	Financing through local equity market	26	▨
8.03	Ease of access to loans	25	▨
8.04	Venture capital availability	19	▨
8.05	Restriction on capital flows	31	▨
8.06	Strength of investor protection*	5	■
8.07	Soundness of banks	1	■
8.08	Regulation of securities exchanges	23	▨
8.09	Legal rights index*	16	▨
	9th pillar: Technological readiness		
9.01	Availability of latest technologies	9	■
9.02	Firm-level technology absorption	18	▨
9.03	Laws relating to ICT	14	▨
9.04	FDI and technology transfer	7	■
9.05	Mobile telephone subscribers*	75	▨
9.06	Internet users*	6	■
9.07	Personal computers*	1	■
9.08	Broadband Internet subscribers*	10	■
	10th pillar: Market size		
10.01	Domestic market size*	13	▨
10.02	Foreign market size*	15	▨
	11th pillar: Business sophistication		
11.01	Local supplier quantity	17	▨
11.02	Local supplier quality	12	▨
11.03	State of cluster development	16	▨
11.04	Nature of competitive advantage	40	▨
11.05	Value chain breadth	48	▨
11.06	Control of international distribution	20	▨
11.07	Production process sophistication	22	▨
11.08	Extent of marketing	9	■
11.09	Willingness to delegate authority	12	▨
	12th pillar: Innovation		
12.01	Capacity for innovation	18	▨
12.02	Quality of scientific research institutions	4	■
12.03	Company spending on R&D	22	▨
12.04	University-industry research collaboration	14	▨
12.05	Gov't procurement of advanced tech products	29	▨
12.06	Availability of scientists and engineers	7	■
12.07	Utility patents*	10	■

* Hard data

Note: For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" at the beginning of this chapter.

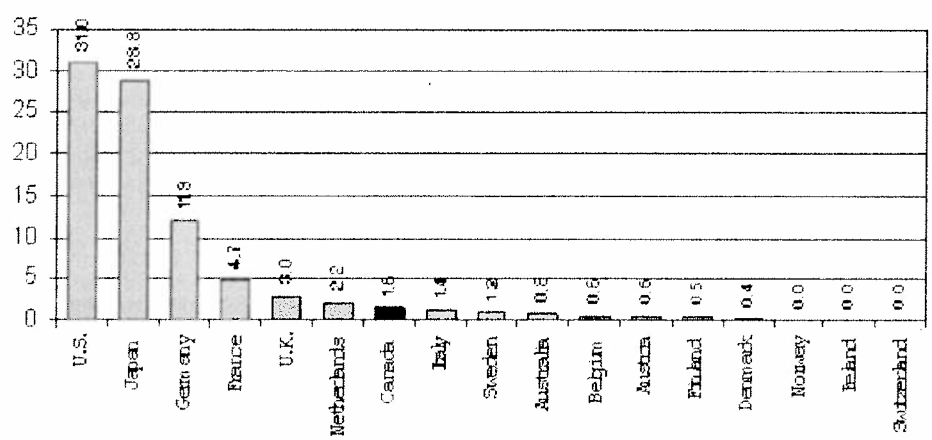


Data Sources: * ARIF Number of medical papers (OST, 2008); GDP data

Whereas Canada fares well in terms of academic achievements, as measured by peer-reviewed publications outcomes (figure 2), there is considerable room for improvement compared with other OECD countries in terms of commercialization of health research results. For instance, as seen in Fig 3, Canada's share of world patents pales by comparison with other industrialized countries such as the USA, Japan or Germany.

Figure 3

Canada's share of world patents



Several recent studies have confirmed the significant economic returns from investing in health research. For example, a 2008 UK study[4] indicated that the GDP returns on investment for investments in health research are approximately $0.30 for every dollar invested per annum. An Australian study[5] estimated the returns on research investments in Australia in 2003 and 2008 and found that every dollar invested in research yielded net benefits to society (benefits over costs) of $1.40. The study also suggested that more than double any investment in research is being returned as a benefit to Australian society. The non-monetary returns on investments from health research to society are numerous. They include: extended life expectancy; improved quality of life; reduced burden on health care systems; and reduced inequities in health.

A 2006 study by the Rand Corporation showed that federal investments in academic research have helped put Canada in the top position, along with Germany, among 29 industrialized countries in terms of its ability to seize the benefits of the global technology revolution for competitive advantage. However, the report also warns that a high level of capacity must be maintained because countries such as the U.K., China and India are not standing still. As a small country, Canada cannot afford to excel in all areas of science and technology development. It must focus on its strengths to develop competitive advantage. Health research is one of the four domains where Canada has internationally-recognized research strength - a fact recognized by the Council of Canadian Academies in its 2006 report, *The State of Science & Technology in Canada*.

CIHR investments in health research also translate into health improvements. For example, research into new drugs such as aromatase inhibitors and herceptins has led to a dramatic increase in breast cancer survival (from 1.5 to 2 years in 1998 to greater than 6 years in 2008). Similarly, the death rate after a heart attack in Canada has decreased by more than 50 per cent in the past decade, due to innovations in treatment and improvements in health systems to provide timely care. Another example is the study entitled "Avoidable mortality by neighbourhood income in Canada: 25 years after the establishment of universal health insurance", co-authored by a group of researchers that included a funded CIHR recipient. This study demonstrated that Medicare greatly reduced mortality inequalities. Specifically, reductions in deaths that were amenable to medical care contributed more significantly to narrowing socioeconomics mortality disparities.

In November 2008, the Ministers and representatives of ministries of health, science and technology, education, foreign affairs and international cooperation from 59 countries adopted a Call to Action in Bamako (Mali) that urges national governments to allocate at least 5 per cent of ministry of health budgets to research. As of 2006, Canada was close to this target, with a public sector investment in health research representing approximately 4.8 per cent.[6] CIHR itself accounts for approximately 59 per cent of the Government's total health research expenditures. In addition, the call to action endorsed the principle of ensuring the "translation of knowledge through development of effective interventions, evidence-informed policies and practices, and effective public communication in order to promote healthy behaviours and ensure public confidence and trust."[7]

Health research as a lever for building capacity

One of the main activities of public-sector R&D must be training a skilled work force. As stated by Mike Lazaridis, inventor of the BlackBerry, "The number one reason to fund research well and with vision is to attract the very best researchers from around the world. Once [in Canada], they can prepare Canada's next generations of graduates, masters, PhD's and post-doctorates, including the finest foreign students. All else flows from this."[8] As demonstrated in Figure 4, the level of training is critically linked to the number of jobs created.

Figure 4

Alignment of level of training and employment

MIT to make all faculty publications open access

In the latest salvo in the fight over open access scholarship, the faculty of MIT have voted to make any publication originating at the university open access.

By John Timmer | Last updated March 24, 2009 9:21 PM CT

If there were any doubt that open access publishing was setting off a bit of a power struggle, a decision made last week by the MIT faculty should put it to rest. Although most commercial academic publishers require that the authors of the works they publish sign all copyrights over to the journal, Congress recently mandated that all researchers funded by the National Institutes of Health retain the right to freely distribute their works one year after publication (several foundations have similar requirements). Since then, some publishers started fighting the trend, and a few members of Congress are reconsidering the mandate. Now, in a move that will undoubtedly redraw the battle lines, the faculty of MIT have unanimously voted to make any publications they produce open access.

So far, the battle lines on open access have been drawn with publishers on one side, funding groups on the other. Funding groups, such as the NIH, Wellcome Trust, and Howard Hughes Medical Institute, feel that the research they pay for will have a larger impact if more people have access to it. In the case of government agencies, there's the added issue of allowing access by the tax payers that ultimately fund the work. This has led a number of them to adopt policies in which the researchers they fund retain the right to freely distribute their works some time after publication. This grace period, usually six months to a year, allows the publishers to extract some value out of their role in arranging for the review and formatting of the works.

The NIH had been promoting open access for several years, but the policy was made mandatory in 2008, and that change was made permanent this year. With its multibillion dollar budget, the NIH policy change was a seismic shift; although some publishers embraced the change, there has been a notable backlash. Meanwhile, the House Judiciary Committee felt it had not been properly consulted when the mandatory policy was enacted. For the past two years, bills have been introduced that would overturn it.

Although there are some passionate advocates of open access publishing within the community of research faculty, this fight was, to an extent, going on over their heads. After all, faculty are completely reliant on both parties involved: the funding agencies pay for their work, and publishers ensure that it finds an audience. Obviously, this puts the faculty in no position to negotiate.

All of that helps explain the significance of the policy adopted by the MIT faculty, which commits everyone at MIT to a policy that is even more aggressive than the one that governs NIH grant recipients. (Hal Abelson, who chaired the committee that drafted the policy has posted a copy of it). In short, as of last week, everyone at MIT is expected to retain rights to distribute their works at no cost for their parent institution. Anybody who wants to publish with a journal that refuses to grant these rights will have to submit a written request for an exception to the MIT provost.

The faculty will have to prepare an appropriately formatted copy of their works to the provost for hosting. MIT plans to place them on its DSpace system, a content hosting system it developed with HP and distributes under a BSD license.

Far more striking than the policy itself, however, is the perspective of those who were instrumental in formulating it. Professor Hal Abelson, in a statement provided by MIT, said, "scholarly publishing has so far been based purely on contracts between publishers and individual faculty authors. In that system, faculty members and their institutions are powerless. This resolution changes that by creating a role in the publishing process for the faculty as a whole, not just as isolated individuals." Ann Wolpert, who directs MIT's libraries, said, "in the quest for higher profits, publishers have lost sight of the values of the academy."

Those are pretty clearly fighting words. The policy itself doesn't seem to involve any attempt to find middle ground with the publishers, as there is no grace period where journals would have exclusive access, in contrast to the NIH policy. Clearly, the MIT faculty produce a lot of research that academic publishers will be anxious not to lose access to, but MIT seems to be hoping that other universities follow along, citing similar policies enacted by individual schools at Harvard and Stanford.

Another approach to open access publishing is being tested by Sweden's Lund University, which is allocating money to support those of its faculty that wish to publish in open access journals. In this case, the money goes to support open access publishers; Lund refused a campus-wide discount for publishing with the Public Library of Science, and will instead pay the higher individual rates. It's also decided not to use this money to pay for open access articles in an otherwise closed publication.

These developments indicate that faculty want to have more options than contributing to the open access debate as individual advocates. If more institutions that have the size and intellectual heft of MIT stake out similar positions, then the researchers may have a very powerful voice.

Open Access in Libraries & Cultural Resources

May 1, 2009

The Academic Council of Libraries and Cultural Resources at the University of Calgary has adopted a mandate to deposit their scholarly output in Dspace, the University's open access scholarly repository. The repository has been in place since March 2003 and currently provides access to a broad range of scholarly output, including a growing collection of full text university theses.

Members of the Council, comprised of archivists, curators, and librarians, have long supported open access through promotions on campus such as Open Access Day, membership in SPARC and Canadian Association of Research Libraries, support for online open access journals published through the University of Calgary Press, and an active program of introducing the repository to faculty and graduate students. Libraries and Cultural Resources also funds the $100,000 Open Access Authors Fund to assist researchers to publish in open access journals.

The text of the mandate is:

> "As an active member of the Scholarly Publishing and Academic Resources Coalition, Libraries and Cultural Resources at the University of Calgary endorses the Budapest Open Access Initiative, the Bethesda Statement on Open Access Publishing and the Berlin Declaration.
>
> LCR academic staff members believe that the output of our scholarly activities should be as widely disseminated and openly available as possible. Our scholarly output includes but is not limited to journal articles, books and book chapters, presentations if substantial, conference papers and proceedings, and datasets.
>
> Effective April 17, 2009, LCR academic staff commit to
>
> - Deposit their scholarly output in the University of Calgary's open access scholarly repository
> - Promote Open Access on campus and assist scholars in making their research openly available
> - Where possible, publish their research in an open-access journal"

More information about the institutional repository

LCR draft submission guidelines (PDF)

For further questions or comments, please contact:

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SiteMap

http://www.indybay.org/newsitems/2009/05/11/18594281.php

Santa Cruz Indymedia | Education & Student Activism | Health, Housing, and Public Services | Labor & Workers

UCSC Budget Cuts to Affect Graduate Student Health Care Coverage

by Protect GSHIP

Monday May 11th, 2009 6:26 PM

UCSC is seeking to meet budget deficits by cutting health care coverage and benefits to its graduate students, including those with families and dependents. Last week Lisa Sloan, Dean of Graduate Studies and Professor of Earth Sciences, asked the Graduate Student Association to approve cuts to current levels of coverage for the Graduate Student Health Insurance Plan (GSHIP). These cuts could increase the cost of co-pays for doctor visits and emergency care, decrease life-time coverage limits and probably, and most significantly, increase co-pays for prescription drugs, even those taken on a regular basis for chronic conditions.

For Immediate Release

May 9th, 2009

UCSC Budget Cuts to Affect Graduate Student Heath Care Coverage UCSC is seeking to meet budget deficits by cutting health care coverage and benefits to its graduate students, including those with families and dependents. Last week Lisa Sloan, Dean of Graduate Studies and Professor of Earth Sciences, asked the Graduate Student Association to approve cuts to current levels of coverage for the Graduate Student Health Insurance Plan (GSHIP). These cuts could increase the cost of co-pays for doctor visits and emergency care, decrease life-time coverage limits and probably, and most significantly, increase co-pays for prescription drugs, even those taken on a regular basis for chronic conditions.

Nellie Chu, graduate student in the Department of Anthropology and member of the Protect GSHIP Committee, underwent surgery last year to remove a 10cm tumor from her adrenal gland. Chu says, "GSHIP provided me with the affordable health care I needed to save my life." With these cuts to GSHIP, however, Chu worries that access to healthcare will be out of reach for graduate students with serious illnesses such as hers. "We simply cannot afford to pay more for healthcare on our small salaries as Teaching Assistants," Chu says.

The effect will also likely be an increase in out of pocket expenses for prescriptions. Psychology graduate student Jessy Lancaster, who already pays nearly a hundred dollars per month for allergy-related prescriptions, says, "based on the proposed increase of prescription costs, I will be paying an additional several hundred dollars a year for medications. If the UC wants to attract and retain graduate students, we shouldn't have to take out hundreds of dollars of additional student loans every year just to stay healthy."

These increases, in conjunction with significant rent increases for graduate students living in Family Student Housing, cuts to graduate student funding, lay-offs of lecturers and non-tenured instructors, the attempt to shut down the renowned Community Studies Department, and increase tuition costs across the board marks a concerted effort on the part of the UCSC administration to transfer an undue portion of the University's budgetary shortfall to groups of students who are least able to bear an increased financial burden.

UCSC has demonstrated a long-standing commitment to fighting economic inequities and promoting social justice issues such as diversity and community. However, UCSC's recent attempts to extract concessions from its most vulnerable populations are in direct contradiction with the spirit of these values. Graduate students are stretched far too thin to be asked to make concessions to our already very modest levels of compensation. We strongly call for the university to rethink how it will deal with its budgetary shortfall in a fair and equitable manner.

The economic crisis has made life more difficult for nearly everyone, and we surely recognize that our standards of living will be changing. But the financial situation of graduate students and their families is already, in many cases, quite difficult. Our personal budgets simply cannot continue to absorb these kinds of cost increases. UCSC administration has placed a May 15 deadline for graduate students to decide for ourselves how to increase our out of pocket healthcare expenses. This puts us in the very real situation of choosing whether to limit our medications for chronic illness, or health care for our children, or regular check-ups. They are requiring that we choose how to limit our access to health care.

If a decision has not been made by graduate students, the UCSC administration will take it upon itself to cut benefits without the consultation and consent of the people directly affected. We are making a stand. Graduate students who do an immense amount of teaching labor for the University, and are paid approximately $15,000 for nine months of work as a Teaching Assistant (many graduate students go jobless over the summer months involuntarily due to the existence of fewer courses), will not accept a huge slash to our health care.

History of Consciousness graduate student Adam Hefty says, "It's outrageous that they are cutting our healthcare when top administrators are receiving higher salaries" in reference to a recent San Francisco Chronicle report (May 8, 2009, "Higher Salaries for UC Administrators"). This report reveals that that the University of California's Board of Regents appointed Dr. Susan Desmond-Hellman as the chancellor of UC San Francisco at a salary of $450,000 a year, a nearly 12% increase over her predecessor. UC Davis's new chancellor, Linda Katehi, the article reports, was recently hired at a salary of $400,000 a year, 27% more than her predecessor.

As if this were not bad enough, the two of administrators responsible for seeking cuts to GSHIP at UC Santa Cruz, Executive Vice Chancellor David Kliger and Dean of Graduate Studies Lisa Sloan "earn" $257.166 and $152,400, respectively (Sacramento Bee "State Salaries": http://www.sacbee.com/statepay).

Protect GSHIP Committee, UCSC, protectgship [at] gmail.com

Canadian Association of University Teachers

News

Two thirds of Canadians concerned about research funding cuts: Poll

Two thirds of Canadians are concerned about cuts to research funding, and the same majority believes government should not steer research, according to a Harris Decima poll conducted in April.

Of the 67% of respondents who said they were concerned about funding cuts to research, half said they were "very concerned".

When asked who should set research priorities, 66% chose the scientific community, compared to 34% who chose the federal government.

When it comes to who to trust in the current debate over research funding, 44% say they trust university and college researchers, compared to just 9% who said they trust the federal government.

The telephone poll was conducted with 2,021 adult Canadians between April 2 and April 13, 2009. Results are considered accurate within plus or minus 2.2%, 19 times out of 20.

The poll also questioned respondents about political leadership and the economy, trust in academic staff and views on their salaries, access to post-secondary education and tuition fees.

A summary of questions asked and answers given is available here.

Culture, Tourism and the Centre for Education Statistics
Research papers

Graduating in Canada: Profile, Labour Market Outcomes and Student Debt of the Class of 2005

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Introduction

In an increasingly knowledge-driven and global economy, a highly skilled well educated workforce is a key driver of economic competitiveness as well as social and economic development. Countries have supported all types of postsecondary education in order to improve the knowledge and skills of the labour force, increase productivity and support world class research. For individuals, a postsecondary qualification contributes to employability, access to continued learning and training and higher lifetime earnings in addition to other related social outcomes. Therefore, governments have emphasized investments in higher education.

Canada has a highly developed postsecondary education system and as a result almost half of young adults aged 25 to 34 years hold some type of postsecondary education credential, well above the OECD average of 33%[1]. However, the demands of the global economy require an optimal skills-job match, which requires more detailed information on the flow of graduates with specific knowledge and skills in addition to the type of postsecondary credential. This demands a greater understanding of the educational pathways of graduates, the investment in time related to their chosen field of study and the labour market outcomes related to each field of study following graduation. Such information is important for informed decisions regarding the expected return for investment in years of education in specific fields of study and estimates of the time required to retire any debt incurred during education. This information is also valuable to determine the distribution of skills in the labour force to respond to anticipated skills shortages.

This report describes the educational experiences, labour market outcomes and financing of higher education of recent graduates for Canadian postsecondary education institutions using data from the 2007 National Graduates Survey (Class of 2005). The first section describes the characteristics of graduates from college, bachelor, master and doctorate level programs. The second section focuses on experiences after graduation including pursuing further education and labour market activities. Section three presents information on the financing of postsecondary education, its relation to education level and labour market outcomes. The final section focuses on co-operative education and international studies and their relationship with labour market outcomes and student debt.

Section 3

Student loans and debts

Students making their way through the Canadian postsecondary education system are faced with costs that vary along a number of dimensions, including the level of education and field of study, the province of their educational institution, and the time spent completing their degree. When choosing to finance their postsecondary education, students can opt for any combination of government student loans, employment earnings, private loans, family support, and savings, among others. For many, both government and non-government student debt becomes an integral component of life after graduation. The following section provides an overview of different forms of student debt and their relation to education levels. Specifically, it will start with graduates who owed to either government or non-government sources, followed by graduates owing to non-government sources, graduates owing to only government sources, and finally, graduates owing both types of debt. All analyses in the following section were limited to graduates that did not pursue further education within the two years after graduation.

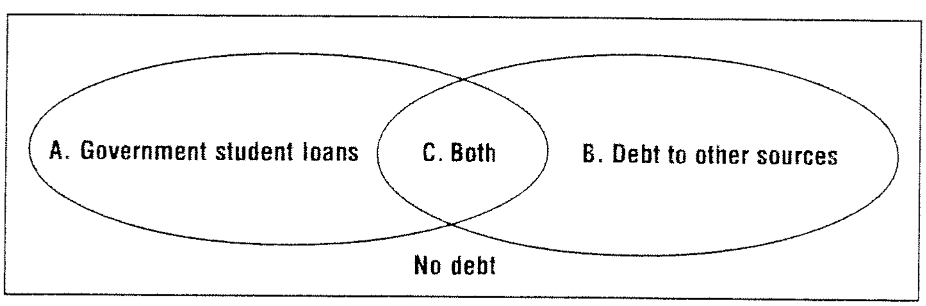
3.1 Overview of student debt

Nearly half of all graduates in 2005 that did not pursue further education had some form of student debt upon graduation

Out of the 194,600 graduates of 2005 that did not pursue further education, 49% of them financed their postsecondary education with some form of education-related loan. The proportion of graduates owing money to any source at graduation varied across the educational levels, from 44% of doctoral graduates to 54% of bachelor graduates.

Figure 3.1

Schematic diagram of student related debt



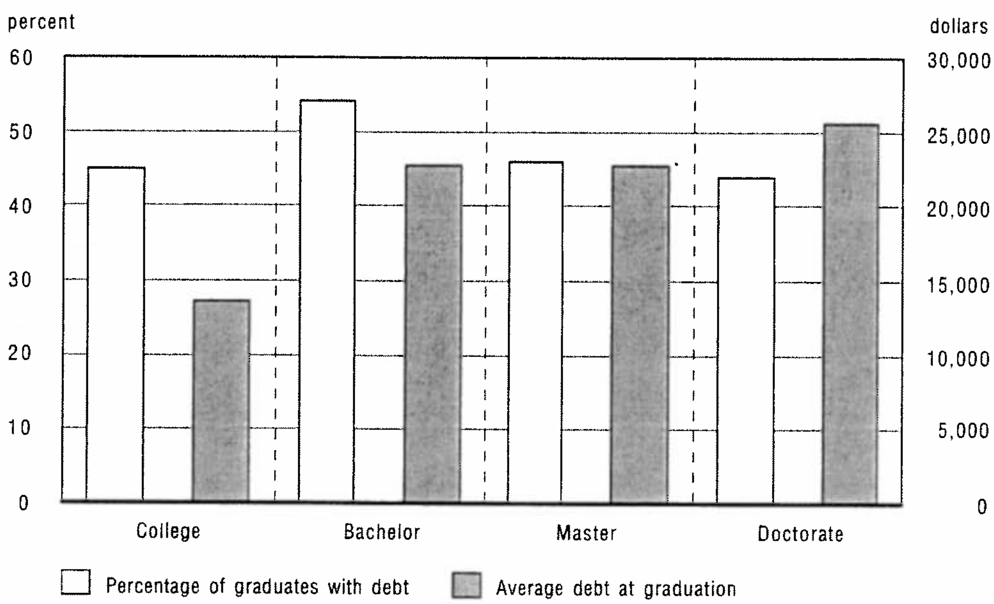
Information on student loans in the National Graduates Survey (Class of 2005)

Respondents of the National Graduates Survey were asked questions on the amount and type of loans they had used to finance their education. This included information on debt that was financed through government or non-government sources and the corresponding amounts. For example, government-financed loans would be considered a government source while private, bank, or family loans would be considered as non-government sources. The amount that graduates owed at the time of graduation may include debt accumulated from past postsecondary education and may not be directly related to the most recent degree, diploma or certificate. For the purpose of this analysis, only graduates that did not pursue further education in the two years upon graduation and thus required to start paying back their student debt are included.

Similarly, of the graduates that held debt related to financing their education, substantial variation existed in their average debt levels from all sources, ranging from $13,600 to $25,600. College graduates[7], characterized by shorter program durations, had the lowest average overall debt level, followed by bachelor, master, and finally doctorate graduates. Chart 3.2 shows the percentage of graduates owing money to all sources and the average amount of debt upon graduation at each level of education.

Chart 3.2

Incidence and average amount of debt to all sources (government and non-government) at time of graduation, by level of study



Source: Statistics Canada, National Graduates Survey (Class of 2005).

Out of the 54% of bachelor graduates who had some form of student debt at graduation (roughly 51,000 graduates), almost 80% of them had a government debt. This was similar across all levels of education: 76% (of the 45%) of college graduates, 74% (of the 46%) at the master level and 77% (of the 44%) of doctorates. The average debt levels of these student loans were very similar to the average debt of graduates that owed only to government sources (see table A.7 in appendix).

Despite average debt loads exceeding $20,000 for graduates with student debt at the bachelor, master, and doctorate levels, about a quarter had paid off their overall debt two years after graduating. Master degree graduates had the highest proportion (32%) that had paid off their student related debt (both government and non-government), followed by doctorate (30%), bachelor (28%), and finally college graduates (24%).

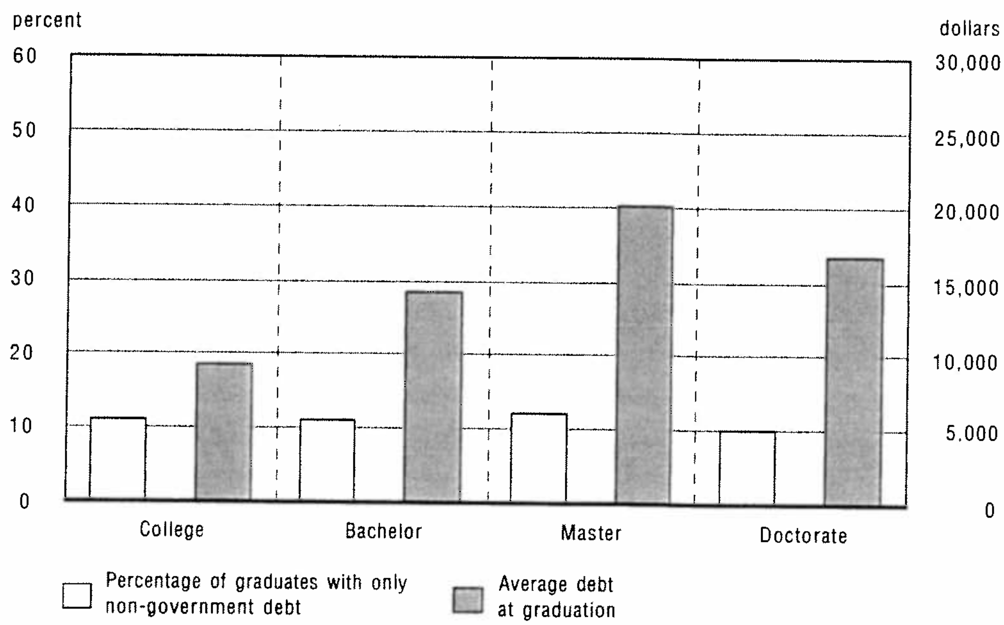
One in nine graduates had debt owing only to non-government sources, with little variation across education levels

About 22,000 graduates – or 11% of all graduates from 2005 who did not pursue further education – owed debt only to non-government sources. Non-government student loans, consisting mostly of private, bank or family loans, varied little across the educational levels, with a range of 10% of doctorates to 12% of masters.

The average debt size of graduates owing only non-government student loans, however, showed that higher levels of education were associated with higher levels of debt. Chart 3.3 shows that the average debt owed only to non-government sources at graduation ranged from $9,300 at the college level to over $20,000 at the master level.

Chart 3.3

Incidence and average amount of debt to non-government sources only at time of graduation, by level of study



Source: Statistics Canada, National Graduates Survey (Class of 2005).

There was a large proportion of graduates that had paid off their non-government student debt entirely two years after completing their 2005 diploma or degree. Overall, 43% of all 2005 graduates owing only to non-government sources had fully paid off their student debt two years after graduation, with bachelor graduates having the highest proportion (45%) followed by doctorate graduates (42%), and college and masters (41%).

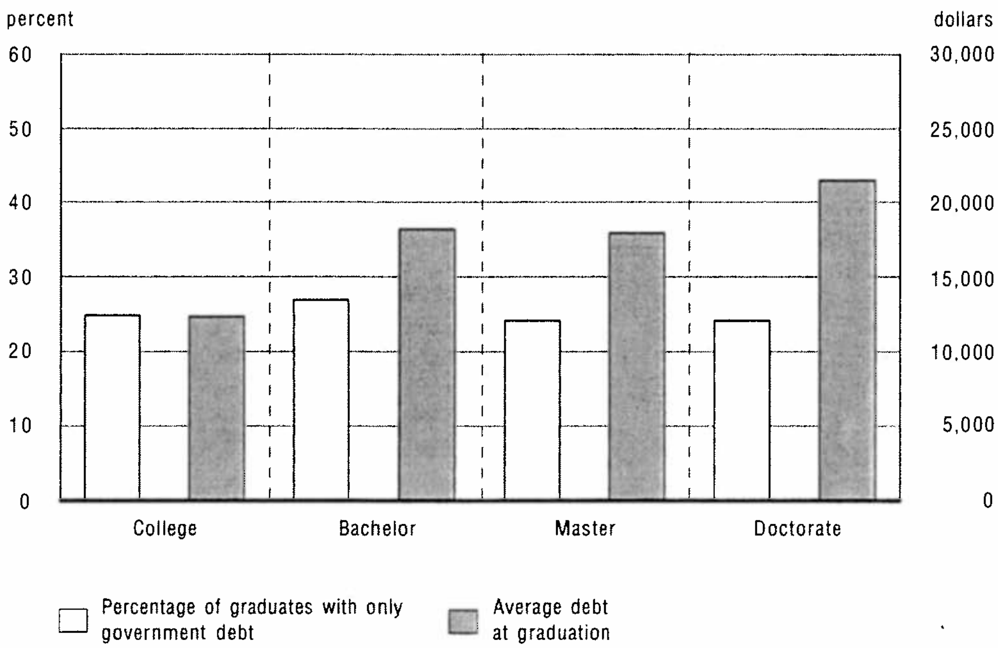
About a quarter of graduates who did not pursue further education owed only to government-financed student loans

Roughly 50,000 graduates – or about 26% of all 2005 graduates who did not pursue further education – owed money only to government sources upon graduation. The proportion of graduates owing across the educational levels did not differ substantially, with 25% of college graduates, 24% of master and doctorate graduates, and 27% at the bachelor level.

The average debt size of graduates owing only to government sources was highest among doctorates ($21,600) and was lowest for college graduates ($12,300). Bachelor graduates, representing almost half of all graduates owing only government student loans at graduation, owed on average $18,200. Chart 3.4 shows the distribution of graduates that owed only to government sources and the average size of this debt.

Chart 3.4

Incidence and average amount of debt to government sources only at time of graduation, by level of study



Source: Statistics Canada, National Graduates Survey (Class of 2005).

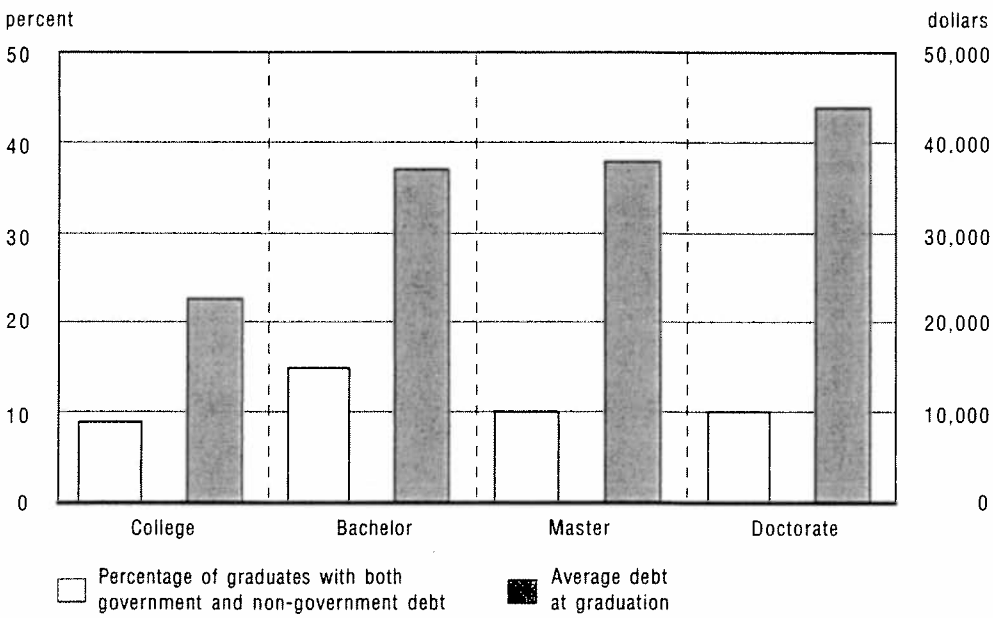
Overall, nearly 14,000 graduates – or roughly 27% of those owing only to government sources at time of graduation – had paid off their debt two years later. The proportion differed across the education spectrum with graduates from a master degree having the highest proportion paying off this debt (34%), followed by doctorate graduates (33%), bachelor (31%), and lastly, college (20%).

Roughly 12% of graduates who did not pursue further education owed to both government and non-government sources

Over one in seven bachelor graduates who did not pursue further education owed to government and non-government sources. Similarly, about 10% of graduates from master and doctorate programs owed to both sources. Chart 3.5 shows, similar to charts 3.2, 3.3, and 3.4, the incidence and average amount of debt owed to both sources (government and non-government) by level of education.

Chart 3.5

Incidence and average amount of debt of graduates owing to both government and non-government sources at time of graduation, by level of study



Note: Please note that the scale on which estimated debt was plotted differed from previous figures because of the sheer size of average debts of those owing to both government and non-government sources.
Source: Statistics Canada, National Graduates Survey (Class of 2005).

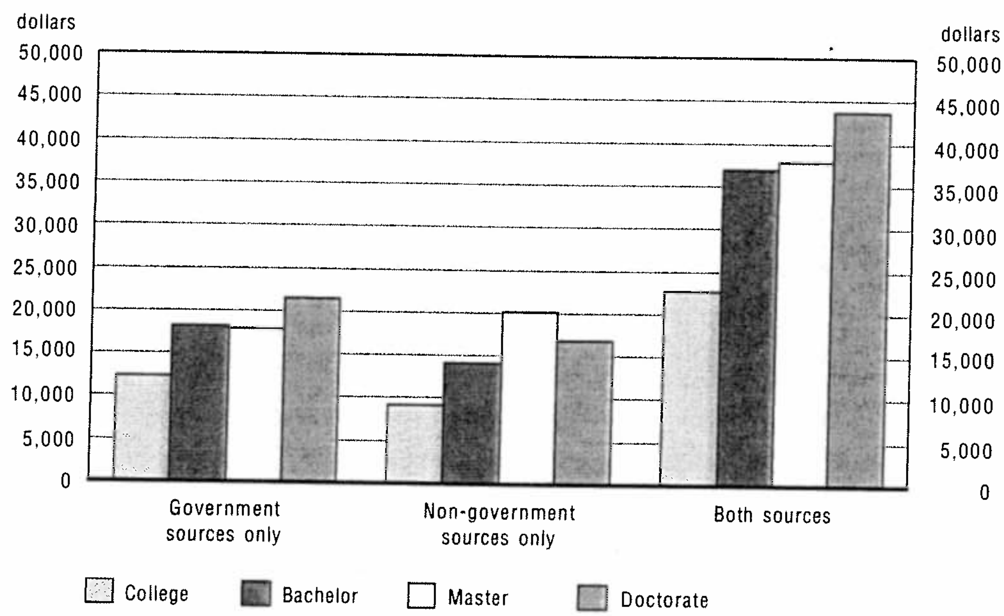
While the proportion of graduates owing to both sources of debt was not remarkably high, in relative terms, the average amount owed differed substantially from those that owed to only one type of debt source.

The first substantial difference apparent in Chart 3.6 below was the magnitude of the average debt owed relative to average amounts owed to single sources. For example, the average debt of a graduate with a college degree who owed to both sources at graduation was $1,000 more than combining both the average debt of those who owed only to government sources with the average debt of those who owed only to non-government sources at the college level.

The second substantial contrast apparent from Chart 3.6 was the difference in average debt amounts between levels of education. The difference between the average debt (for those owing to both sources) of a college graduate and that of a bachelor graduate was $14,400. A further and more complete analysis should be undertaken on the composition of debt of these graduates.

Chart 3.6

Average amount owed to government sources only, non-government sources only, and both sources, by level of study



Source: Statistics Canada, National Graduates Survey (Class of 2005).

The next section will discuss how the proportion of graduates owing debt (both government and non-government), as well as how much they owed on average have changed compared to graduates of 2000. For comparison purposes, all forms of debt were converted to 2007 constant dollars.

The proportion of graduates with any debt upon graduation and the average size of this debt were similar for the 2000 and 2005 graduating classes

As indicated earlier, roughly half of all 2005 graduates who did not pursue further education owed money to either a government or non-government source for their post-secondary education. This proportion was almost identical to the proportion of graduates of 2000 who owed debt to any source (50%). Given that the 2005 class represented a higher number of graduates than all of the previous graduating cohorts, the number of graduates with any source of debt rose from 89,700 in 2000 to 96,300 in 2005.

The average debt from all sources in constant 2007 dollars among members of the 2005 cohort that owed student related debt did not differ much from the class of 2000. The differences, albeit small, revealed that graduates from 2005 with student debt had lower average debt levels than their 2000 counterparts: doctorate graduates owed about $1,300 less on average while college graduates owed about $700 less.

Graduates from the Class of 2005 owing only to non-government sources, tended to owe more on average than their 2000 counterparts across all levels of education

The 2005 graduating class had a higher proportion of graduates that owed only to non-government sources, and the average debt level of these graduates was higher relative to similar graduates of 2000. Specifically, 2005 college diploma holders owed about $1,400[8] more, bachelors owed about $3,600 more, and master graduates about $4,100 more. In terms of percentage differences, bachelor graduates with non-government debt only owed 32% more than bachelor degree holders of 2000 while 2005 master graduates owed 24% more than their 2000 counterparts. Table 3.1 shows that the proportion of graduates and their average debt level (non-government only) was higher in 2005 than in 2000 across most levels of education.

Table 3.1

Proportion and average debt (in 2007 constant dollars) of 2000 and 2005 graduates owing to non-government sources only, by level of study

	Proportion of graduates		Average amount of student debt (2007 constant dollars)		
	Class of 2000	Class of 2005	Class of 2000	Class of 2005	Difference
	percent	percent	dollars	dollars	dollars
College	8	11	8,300	9,700	1,400
Bachelor	8	11	11,100	14,700	3,600
Master	7	12	16,800	20,900	4,100
Doctorate	7	10	18,000	17,500	-500

Note: Graduates who pursued further education after their 2005 graduation are excluded from this table.
All amounts are rounded to the nearest 100, but analysis is carried out on unrounded values.
Source: Statistics Canada, National Graduates Survey (Classes of 2000 and 2005).

The proportion of graduates owing only to government sources and their average debt load was lower among 2005 graduates relative to the 2000 cohort

Across all levels of education in 2005, the proportion of graduates who owed only to government sources dropped from the levels observed in 2000: table 3.2 reveals that there was an 8 percentage point decline in the proportion of college graduates with only government debt, a 7 percentage point decline at the bachelor level, a 6 percentage point decrease for masters graduates, and finally, 2 percentage points at the doctorate level.

Not only were the proportion of graduates owing only to government debt lower in 2005 compared to graduates of 2000 but the average debt level on these loans was lower than the levels of 2000 with the exception at the doctorate level. The largest difference in the average government debt level between 2005 and 2000 graduates was at the bachelor level, where 2005 graduates owed about $3,600 less.

Table 3.2

Proportion and average debt (in 2007 constant dollars) of 2000 and 2005 graduates owing to government sources only, by level of study

	Proportion of graduates		Average amount of debt (2007 constant dollars)		
	Class of 2000	Class of 2005	Class of 2000	Class of 2005	Difference
	percent	percent	dollars	dollars	dollars
College	33	25	14,600	12,800	-1,800
Bachelor	34	27	22,600	19,000	-3,600
Master	30	24	20,600	18,700	-1,900
Doctorate	26	24	20,900	22,500	1,600

Note: Graduates who pursued further education after their 2005 graduation are excluded from this table.
All amounts are rounded to the nearest 100, but analysis is carried out on unrounded values.

Source: Statistics Canada, National Graduates Survey (Classes of 2000 and 2005).

In line with lower average debt levels (government sources only), the proportion of graduates with debt at graduation and who had paid off their government debt two years after graduating was higher among the 2005 cohort than the 2000 cohort (see Table 3.3 below).

Table 3.3

Proportion of 2000 and 2005 graduates who had paid off their government debt two years after graduation, by level of study

	Class of 2000	Class of 2005
	percent	percent
College	17	20
Bachelor	22	31
Master	27	34
Doctorate	32	33

Note: Graduates who pursued further education after their 2005 graduation are excluded from this table.

Source: Statistics Canada, National Graduates Survey (Classes of 2000 and 2005).

A comparison between the two cohorts (Class of 2000 and Class of 2005) reveals that the proportions of graduates owing to both sources of student debt did not differ substantially for most levels of study. There was, however, a 4 percentage point increase in the proportion of bachelor graduates who owed to both government and non-government sources at graduation. If we convert the 2000 and 2005 debt owed to both sources at graduation to constant 2007 dollars, graduates of 2000 who owed to both sources of debt had higher average debt loads at the master and doctorate levels while graduates of 2005 with both types of loans had higher average debt at the college and bachelor levels. Table 3.4 shows the average amount of debt owed to both sources and the monetary difference between the two graduating classes.

Table 3.4

Proportion and average debt (in 2007 constant dollars) of 2000 and 2005 graduates owing to both government and non-government sources, by level of study

	Proportion of graduates		Average amount of debt (2007 constant dollars)		
	Class of 2000	Class of 2005	Class of 2000	Class of 2005	Difference
	percent	percent	dollars	dollars	dollars
College	8	9	22,400	23,600	1,100
Bachelor	11	15	37,600	38,600	900
Master	8	10	41,000	39,400	-1,600
Doctorate	12	10	50,000	45,500	-4,500

Note: Graduates who pursued further education after their 2005 graduation are excluded from this table.
All amounts are rounded to the nearest 100, but analysis is carried out on unrounded values.

Source: Statistics Canada, National Graduates Survey (Classes of 2000 and 2005).

3.2 Government-financed student debt

The overview of debt (government and non-government) from the previous section revealed that graduates of 2000 and 2005 used debt to finance their education that varied in the size and whether it was a government or non-government loan. The graduates of the 2005 class who had debt were more likely to have owed only to non-government sources – and have larger average debt. Conversely, they were less likely to owe only to government sources – and their average debt was smaller. The average debt sizes also showed that some graduates had substantial financial burden once graduated. From this perspective, some graduates – especially those considered to have large debt – could have difficulties repaying their debt.

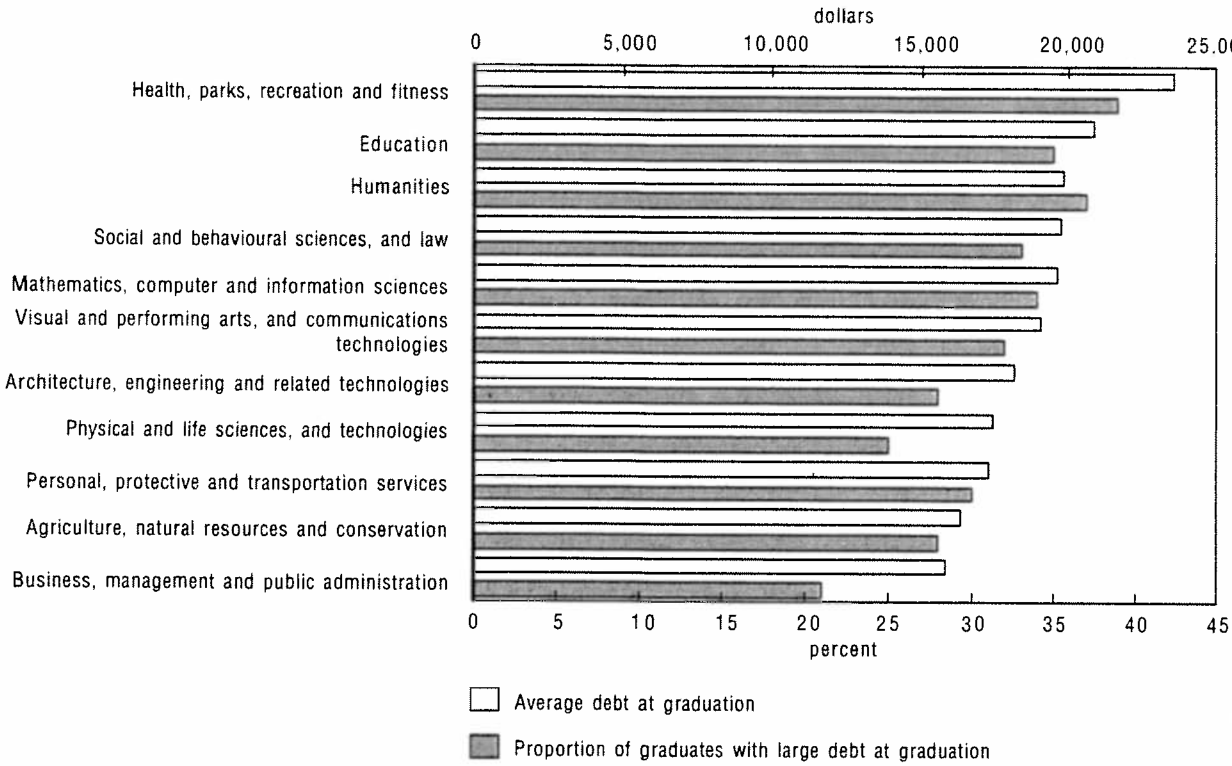
With a focus on government-financed student debt, the next section will outline large debt loads, personal income, difficulties in debt repayment, and debt-servicing ratios of graduates that did not complete any further education. The reader should make note that all references to debt in the next section refer to graduates who had government debt at graduation, and not the entire universe of 2005 graduates.

Overall, a number of students accumulated government-financed student debts of $25,000 or more at all levels of education

Out of the Class of 2005 who had government student loans, a substantial proportion of graduates with a college, bachelor, master or doctorate degree accumulated large debt loads – debt of $25,000 or more. Doctorate graduates with government debt had the largest proportion with large loans (35%) followed by bachelor (32%), master (27%) and college graduates (12%). Moreover, variation existed in the proportion of graduates with large debt across fields of study within each level of education. For example, 47% of college Humanities graduates and 11% of college Business graduates had large debt loads upon graduation. Chart 3.7 shows the size of average debt at graduation and the distribution of bachelor graduates across fields of study with large debt loads.[9]

Chart 3.7

Distribution of average debt across fields of study at the bachelor level and proportion of graduates within each field with large debt loads



Source: Statistics Canada, National Graduates Survey (Class of 2005).

Interestingly from Chart 3.7, graduates from Business, management and public administration not only had the lowest average debt but also the lowest proportion of graduates with large debt loads. Health, parks, recreation and fitness – a field that included Medicine – had the highest average debt load ($23,600) and also had the highest proportion with large debt loads (39%).

> **Understanding the distribution of student debt: Small, Medium, and Large debt loads**
>
> The amount of debt that students undertake for postsecondary education can vary by the level of education, the province in which the educational institution was located, and duration of time spent in the degree. For the purpose of the report, three levels of debt were used: small debt – under $10,000, medium debt – $10,000 to $24,999, and large debt – $25,000 or more.

Those with higher levels of debt at graduation were less likely to pay it off in two years. Graduates from a bachelor degree who were still paying down their debt two years after they graduated were over two times more likely to have had large government debt ($25,000 or more). The results were paralleled at the master and doctorate levels.

Comparing graduates across cohorts, the proportion with a large debt load at graduation remained virtually unchanged. There was one exception, however: doctorate graduates of 2005 were more likely to have large debt loads than their 2000 counterparts. Table 3.5 partitions graduates with a government debt into two categories: 1) those that were still repaying their student debt two years after graduation and 2) those that were finished repaying their government student loans. Considering just graduates who were still paying off their government debt two years after graduation, few differences in proportions with large debt were found across cohorts, except at the doctorate level (32% had a large debt at graduation in 2000 compared to 40% in 2005). Although the proportion of graduates with large debt at graduation was similar for master graduates and higher for doctorate graduates from the 2005 cohort, more master and doctorate graduates had paid off their loans two years after graduation compared to the 2000 cohort.

Table 3.5

Proportion of graduates with large government debt at graduation for those who were still paying two years later and those who were not, by level of study

	Proportion of graduates with large government debt for those owing at graduation		Proportion of graduates with large government debt for those who had debt remaining two years after graduation		Proportion of graduates with large government debt for those without debt two years after graduation	
	Class of 2000	Class of 2005	Class of 2000	Class of 2005	Class of 2000	Class of 2005
	percent	percent	percent	percent	percent	percent
College	12	12	14	14	F	F
Bachelor	31	32	35	38	18	16
Master	26	27	32	32	10	17
Doctorate	27	35	32	40	15	24

F too unreliable to be published
Note: Graduates who pursued further education after their 2005 graduation are excluded from this table.
Source: Statistics Canada, National Graduates Survey (Classes of 2000 and 2005).

On average, graduates that were still paying off their government debt two years after graduation earned less than graduates that had completely paid off their student loans

Overall, higher average earned income in 2006 was associated with higher levels of education for both those that had paid off their debt and those that were still paying. Interestingly, the earned income in 2006 was larger at each education level for graduates who managed to pay off their government-financed student debt relative to those who were in the midst of paying it off. Bachelor graduates who had paid off their debt earned over $8,000 dollars more – or roughly 23% more – than their counterparts that had debt two years after graduation. Similar results were found for college (7%), master (27%), and doctorate (7%) graduates.

Employment rates did not differ between the two groups of graduates (who had and had not paid off their student debt) at the college and bachelor levels but there were somewhat large differences at the master and doctorate levels. Master graduates who had paid off their government debt had an employment rate that was 6 percentage points higher while doctorate graduates had an employment rate 3 percentage points higher.

Comparisons between the 2005 and 2000 graduating classes show that, overall, average earned income (in 2007 constant dollars) differed at the bachelor and doctorate levels across cohorts: bachelors of 2005 who had government debt at graduation earned roughly $2,500 more than similarly defined graduates of 2000. Doctorates with a government related student debt at graduation earned roughly $9,500 dollars less (in 2007 constant dollars). Separating graduates into those with debt paid off and those still owing, certain 2005 graduates fared better than graduates of 2000, while others did worse. Bachelor graduates who accumulated debt during their degree and were without debt two years later (class of 2005) earned 12% more on average than similar bachelor graduates of 2000. On the other hand, 2005 college and doctorate graduates earned 10% and 14%, respectively, less than college and doctorate graduates of 2000.

In terms of graduates still paying off debt two years after graduation, only doctorate graduates from 2005 differed from their 2000 counterparts: they earned about $9,000 less or 85% of what the 2000 graduates earned. There was little that separated the cohorts in terms of employment rates.

About one in four graduates with government debt at graduation in 2005 reported difficulty in repaying their loans

Table 3.6 shows that graduates with government debt at graduation experienced hardship in repaying their loans at every level of education. The proportion of graduates that reported difficulties varied from a high of 29% at the college level to 23% of master graduates. Interestingly, even those that paid off their government-financed student debt reported payment difficulties: 13% among college graduates, 11% of bachelor, 16% at the master level, and 17% of doctorate. However, those still repaying their debt two years after graduation, at every level, were substantially more likely to report difficulties paying. It would be interesting to investigate why graduates have difficulties repaying their student debt. For example, are graduates having difficulties repaying the debt they incurred from their studies because they have taken other types of debt that pertain to life in general such as credit cards, mortgage payments, car loans or private loans?

Table 3.6

Proportion of graduates reporting difficulty repaying their government student debt for those who were still paying two years after graduation and those who were not, by level of study

	All graduates	Graduates with debt remaining two years after graduation	Graduates without debt two years after graduation
	percent	percent	percent
College	29	33	13 E
Bachelor	26	32	11
Master	23	27	16
Doctorate	25	28	17

E use with caution

Note: Graduates who pursued further education after their 2005 graduation are excluded from this table.

Source: Statistics Canada, National Graduates Survey (Class of 2005).

Calculation of debt repayment

The analysis of debt repayment was based on two guiding principles: 1) intra-cohort comparisons (between graduates of a specific year); and 2) inter-cohort comparisons (between similar graduates across graduating years). Comparisons of debt can prove to be difficult: do we compare constant dollars (adjusted for inflation) at some base year, or current dollars for the year in which the debt was reported? In this report, comparisons of debt across graduating classes used a constant 2007 base dollar. Conversely, for the reason outlined in the following paragraph, comparisons of debt within classes did not use an inflation adjustment.

The rationale for not using an inflation adjustment for within-cohort comparisons followed from Allen and Vaillancourt (2004) and can be illustrated with an example: respondents could have appeared to have paid off debt despite not doing so. If a respondent owed $1,000 at graduation and $1,000 two years later, converting the debt two years later to a constant base of the graduation year with a 3% inflation rate would suggest that the respondent paid off about 5% (($943 - $1,000) / $1,000) of their debt, when in fact they did not.

Finding similarities and contrasts across cohorts (2005 class relative to 2000 class) revealed that a higher incidence of reported difficulties in debt repayment was linked to lower levels of education for both 2005 and 2000 graduates with debt at graduation: it was highest among college graduates and lowest among master (lowest among doctorate in 2000).

In terms of contrasts across cohorts, there were minor differences in repayment difficulties at each level of education, however doctorate graduates of 2005 with debt were more likely to report difficulties repaying their debt compared to their peers of 2000 (a 7 percentage point difference). Finally, looking at repayment difficulties of graduates who had paid off their debt completely revealed that the recent cohort (2005) was more likely to report difficulties than their predecessors.

3.3 Profile of the size of student debt at graduation

Student debt of $25,000 or more was classified as large, as accumulation of debt of this size represents a substantial financial burden for most graduates. But what about graduates who have managed to keep their government student debt at lower levels? For example, what is the distribution of graduates with small, medium or large debt? Does this distribution differ across levels of education? This section profiles graduates in terms of average debt, earned income, and difficulties repaying their debt across the different levels of education.

College graduates had the highest proportion with small debt (under $10,000)

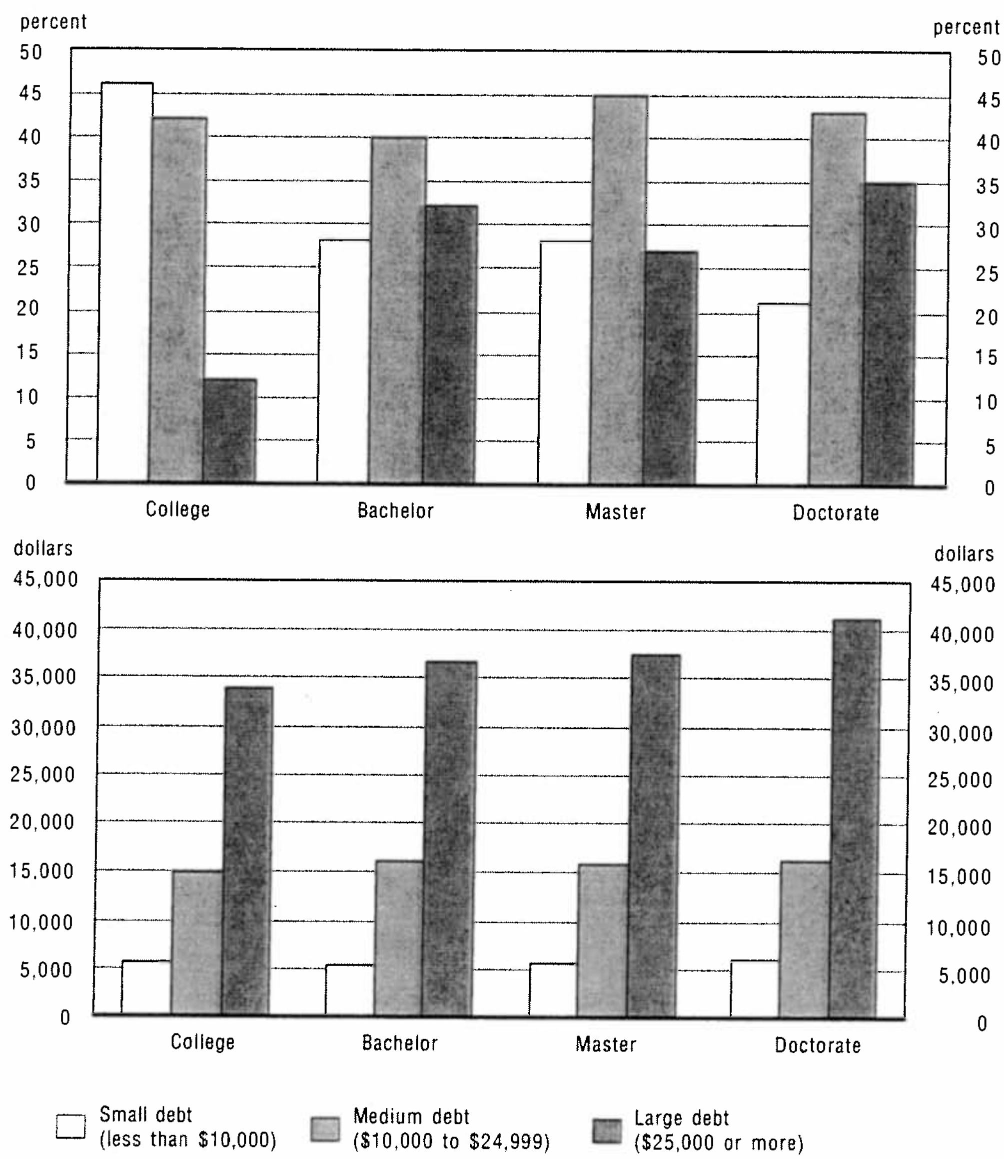
A larger proportion of college graduates who owed money to government student loans at graduation (46%) finished their studies with relatively small debts, compared to graduates at the bachelor (28%), master (28%), and doctorate (21%) levels. However, the average debt level of college graduates with a small debt load at graduation was not different than other graduates at the bachelor, master, and doctorate levels. In other words, those that had small debt upon graduating had roughly the same average debt load across all levels of education.

Directly linked to the classification of debt sizes were the number of graduates that were debt-free[10] two years after graduating. Bachelor graduates with small debt were the most likely to have their debt paid off – 53% had their small debt paid off – while college graduates were the least likely – 30% paid off their small debt two years after graduating.

Not surprisingly, graduates with large debt loads at all levels of education were the least likely to have their debt paid off two years after graduating.

Chart 3.8

Distribution of debt size and average amount of government debt, by level of study



Source: Statistics Canada, National Graduates Survey (Class of 2005).

Doctorate graduates not only had the highest proportion with large debt, but those with large debt had the highest average debt load

Chart 3.8 also reveals that doctorate graduates who had a large debt load (35%) had an average government debt over $41,000. Finally, the proportion of graduates with medium sized ($10,000 to $24,999) debt was highest amongst master graduates (45%) but was not considerably higher than observed at the bachelor (40%), college (42%) or doctorate levels (43%).

Graduates with large debt, and to some extent those with medium sized debt, reported difficulties repaying their loans

At each level of education, there were a number of graduates who reported difficulties repaying their debt. The largest proportions of graduates with difficulties were found at the large and medium debt categories. Specifically, about 45% of graduates with large debt and over a quarter of graduates with medium sized debt reported difficulties. At the lowest debt category, about 14% of graduates reported difficulties repaying their government student loans.

Taking each level of education separately, college graduates were the most likely to report difficulties repaying at each level of debt. Table 3.7 shows the proportion of graduates who reported difficulties repaying their government student loans by level of study.

Table 3.7

Proportion of 2005 graduates who reported difficulties repaying their government student loans, by size of debt and level of study

	Small	Medium	Large
	Less than $10,000	$10,000 to $24,999	$25,000 or more
	percent	percent	percent
College	17	34	59
Bachelor	12	22	43
Master	8 E	22	41
Doctorate	12	22	36

E use with caution

Note: Graduates who pursued further education after their 2005 graduation are excluded from this table.

Source: Statistics Canada, National Graduates Survey (Class of 2005).

Interpretation of debt service ratios

Debt service ratios are crude monetary measures of financial burden – or ability to pay - and are expressed in percentage terms. They are calculated as the ratio of debt payments to earned income during a particular time frame and are interpreted as the percentage of income devoted to debt repayments. Debt service ratios can be high for a number of reasons, which include involuntary low income or voluntary high payments.

While far from conclusive, a number of American studies on student debt burdens have often used 8% as a benchmark: graduates beyond this threshold are thought to have debt that is difficult to manage. In the Canadian context, graduates with trouble managing student debt could utilize the Revision of Terms feature: it provides the borrower with the flexibility to manage their loan repayment in a way that is responsive to their situation. It can be used as a debt management measure designed to decrease monthly payments – and burden. Conversely, it can be used to pay off debt faster through negotiated increases in loan payments.

Directly related to income is the average amount paid towards student debt in a given year (see textbox on Interpretation of debt service ratios). Graduates who are no longer in school are required to start paying back their government student loans, usually on terms set from the onset of the agreement. The amount that is paid in any given year reflects the size of the debt, the interest rate, earnings and the length of time over which the loan is to be paid back. As a proxy for determining debt burden, debt-servicing ratios were used[11]. While this is a somewhat crude measure, a number of studies have established benchmarks on debt-service ratios to gauge the extent of the financial burden. To put debt-servicing ratios into perspective, a number of studies in the literature have used an 8% benchmark to denote a high debt burden; however, it should be noted that Baum and Schwartz (2006) concluded that an affordable debt-servicing-ratio should be based on income that takes into account family size[12]. To see this point, consider three situations: a single individual earning $25,000 annually, a family of 5 earning $25,000 annually, and a family of 3 earning $150,000 annually. In each of these three cases, applying the 8% benchmark denoting high debt burden would be very different. In the second case, it could be argued that no payments should be made while in the last case, 8% would not reflect a burden at all.

For the purpose of this report, family size was not taken into account and thus interpreting debt service ratios should bear this in mind. Finally, debt-servicing ratios were ranked in ascending order from which the debt ratio at the 25th percentile, the median, and finally the 75th percentile was determined.

A quarter of bachelor graduates with large government debt loads had debt-servicing ratios at or above 15%

Bachelor graduates with large debt loads at graduation – $25,000 or more – had the highest debt ratio at the 75th percentile, with 15%. That is, after theoretically repaying their government student debt, 85% of their gross earned income was left for all other debts, costs of living, and other related expenses. Similar proportions were found for college graduates with large government debt loads (14% ratio), master (13%) and finally, doctorate graduates (11%). Not surprisingly, at lower categories of debt, the debt ratios were substantially lower. For example, at the medium debt category – $10,000 to $24,999 – the debt service ratio at the 75th percentile was 9% at the college level, 10% at the bachelor level, 7% at the master and finally 7% at the doctorate level. It should be noted, though, that this could be expected: having similar gross earned income but being in a higher debt category would raise the distribution of debt service ratios.

Summary

Section three showed that a number of graduates not only took on debt during their studies but also had accumulated debt of $25,000 or more. Moreover, graduates with debt to both a government and non-government source had the highest average debt loads. A descriptive analysis comparing the Class of 2000 to the Class of 2005 revealed that the composition of debt had changed: graduates from the Class of 2005 with debt were more likely to have owed to non-government sources and less likely to have owed to government sources at graduation. The analysis also revealed that a number of graduates who had either paid off or were still paying their debt load two years after graduation had difficulties repaying the loans. Finally, the proportion of graduates that reported difficulties in their loan repayment increased with government debt size.

Appendix

Table A.1

Profile of 2005 postsecondary graduates by level of study

		College	Bachelor	Master	Doctorate
Total number of graduates	number	103,900	162,300	35,300	3,500
Female	percent	58	63	56	46
Male	percent	42	37	44	54
Average age at time of graduation	years	26	26	32	35
Median age at time of graduation	years	23	24	29	33
Under age 25 at time of graduation	percent	61	62	14	x
Average duration of program if taken full-time	months	21	39	25	64
In secondary school 12 months prior to entering program	percent	32	40	...	...
Pursued further education after 2005 graduation	percent	31	42	30	8
Completed further education after 2005 graduation	percent	10	16	7	4

... not applicable

x suppressed to meet the confidentiality requirements of the *Statistics Act*

Note: Numbers of graduates are rounded to the nearest 100.

Source: Statistics Canada, National Graduates Survey (Class of 2005).

Table A.2 (concluded)

Profile of 2005 graduates by level of study and field of study (major fields and selected minor fields)

	Total number of graduates	Female	Age at graduation: Average age	Median age	Under 25	Pursued further education after 2005 graduation
	number	percent	years	years	percent	percent
Master						
Total	**35,300**	**56**	**32**	**29**	**14**	**30**
Education	4,500	73	38	37	6 E	18
Visual and performing arts, and communications technologies	800	59	31	27	20	32
Humanities	2,900	59	32	28	22	45
Social and behavioural sciences, and law	4,700	67	30	27	18	38
Business, management and public administration	9,800	49	33	31	12	24
Physical and life sciences, and technologies	2,300	59	28	26	17	46
Mathematics, computer and information sciences	2,000	39	31	28	17	30
Mathematics and statistics and related interdisciplinary fields	400	43	29	27	24 E	48
Computer and information sciences and support services and related interdisciplinary fields	1,200	26	31	29	17 E	31
Library science	400	74	31	28	11 E	F
Architecture, engineering and related technologies	4,100	30	30	28	10	27
Architecture and related services and related interdisciplinary studies	700	64	28	28	13 E	23 E
Engineering	3,200	22	30	28	10	28
Agriculture, natural resources and conservation	900	52	30	27	12	27
Agriculture, agricultural operations, and related sciences	300	47	30	27	12 E	26
Natural resources and conservation	600	54	30	27	11	27
Health, parks, recreation and fitness	3,100	76	31	28	17	27
Other health professions and related clinical sciences	2,000	75	30	27	18	20
Parks, recreation, leisure and fitness studies	300	57	28	26	28 E	40
Personal, protective and transportation services	100	30	35	35	16 E	34
Doctorate						
Total	**3,500**	**46**	**35**	**33**	**x**	**8**
Education	300	65	45	45	x	4 E
Visual and performing arts, and communications technologies	100	52	37	35	x	x
Humanities	300	47	37	34	x	10
Social and behavioural sciences, and law	700	63	36	33	x	6
Business, management and public administration	100	40	39	38	x	8 E
Physical and life sciences, and technologies	900	40	31	30	x	11
Mathematics, computer and information sciences	200	28	33	31	x	x
Architecture, engineering and related technologies	500	18	34	33	x	8
Engineering	500	17	34	33	x	8
Agriculture, natural resources and conservation	100	42	35	33	x	x
Health, parks, recreation and fitness	300	61	36	35	x	15
Other health professions and related clinical sciences	200	56	35	34	x	13
Personal, protective and transportation services	x	x	x	x	x	x

x suppressed to meet the confidentiality requirements of the *Statistics Act*

E use with caution

F too unreliable to be published

Note: Numbers of graduates are rounded to the nearest 100.

The sum of graduates by major field of study may not add up to the total number of graduates due to the fact that the field of study could not be coded for some graduates.

Source: Statistics Canada, National Graduates Survey (Class of 2005).

Table A.6 (concluded)

Estimated gross annual earnings of 2005 graduates working full-time in 2007, by level of study and field of study (major fields and selected minor fields)

	25th percentile	Median	75th percentile
	dollars	dollars	dollars
Master			
Total	**46,800**	**60,000**	**77,900**
Education	52,000	68,000	78,000
Visual and performing arts, and communications technologies	26,000	37,500	46,800
Humanities	33,600	45,500	58,000
Social and behavioural sciences, and law	40,000	50,000	65,000
Business, management and public administration	55,000	69,000	93,600
Physical and life sciences, and technologies	37,400	49,300	62,000
Mathematics, computer and information sciences	44,000	55,000	65,000
Mathematics and statistics and related interdisciplinary fields	48,000	57,000	64,500
Computer and information sciences and support services and related interdisciplinary fields	45,000	58,000	70,000
Library science	41,000	49,100	56,000
Architecture, engineering and related technologies	50,000	60,000	74,000
Architecture and related services and related interdisciplinary studies	40,000	49,000	59,000
Engineering	53,000	62,000	78,000
Agriculture, natural resources and conservation	40,000	50,000	62,400
Agriculture, agricultural operations, and related sciences	37,500	51,900	64,500
Natural resources and conservation	40,000	50,000	60,000
Health, parks, recreation and fitness	50,000	62,400	76,000
Other health professions and related clinical sciences	50,000	60,300	73,000
Parks, recreation, leisure and fitness studies	39,500	47,000	60,000
Personal, protective and transportation services	61,000	90,000	106,800
Doctorate			
Total	**48,000**	**65,000**	**78,000**
Education	68,000	78,000	98,000
Visual and performing arts, and communications technologies	x	69,000	x
Humanities	50,000	60,000	68,000
Social and behavioural sciences, and law	55,000	67,000	78,000
Business, management and public administration	77,000	90,000	108,000
Physical and life sciences, and technologies	40,000	49,400	67,000
Mathematics, computer and information sciences	55,000	65,000	78,000
Architecture, engineering and related technologies	57,000	70,000	85,000
Engineering	57,700	70,000	85,000
Agriculture, natural resources and conservation	45,000	60,000	70,000
Health, parks, recreation and fitness	53,000	70,000	82,000
Other health professions and related clinical sciences	45,200	67,000	87,100
Personal, protective and transportation services	x	x	x

x suppressed to meet the confidentiality requirements of the *Statistics Act*

E use with caution

Note: Graduates who pursued further education after their 2005 graduation are excluded from this table. All numbers are rounded to the nearest 100, but analysis is carried out on unrounded values.

Source: Statistics Canada, National Graduates Survey (Class of 2005).

Table A.7

Student debt from all sources for 2005 graduates, by level of study

		College	Bachelor	Master	Doctorate
Number of graduates	number	71,800	94,800	24,800	3,200
Graduates who owed money for their education to any source (government or non-government)					
Percentage of graduates who owed student debt to any source	percent	45	54	46	44
Average debt owed to all sources at time of graduation	dollars	13,600	22,800	22,800	25,600
Percentage of graduates with debt who had paid it off two years after graduation	percent	24	28	32	30
Average debt remaining two years after graduation for those who still owed	dollars	11,800	20,400	19,500	22,500
Graduates who owed student debt to government student loan programs					
Percentage of graduates who owed government student loans	percent	34	43	34	34
Average debt owed to government student loans at time of graduation	dollars	12,700	19,600	19,000	22,900
Percentage of graduates with debt who had paid it off two years after graduation	percent	19	28	32	30
Average debt remaining two years after graduation for those who still owed	dollars	10,900	16,900	15,800	19,700
Graduates who owed money to non-government sources for their education					
Percentage of graduates who owed non-government student debt	percent	20	26	23	20
Average debt owed to non-government sources at time of graduation	dollars	9,000	14,600	18,400	17,300
Percentage of graduates with debt who had paid it off two years after graduation	percent	38	38	37	36
Average debt remaining two years after graduation for those who still owed	dollars	9,100	16,200	17,500	17,200
Graduates who owed only government student loan programs					
Percentage of graduates who owed only government student loans	percent	25	27	24	24
Average debt owed to government student loan programs at time of graduation	dollars	12,300	18,200	17,900	21,600
Percentage of graduates with debt who had paid it off two years after graduation	percent	20	31	34	33
Average debt remaining two years after graduation for those who still owed	dollars	10,500	16,200	14,500	18,400
Graduates who owed only to non-government sources for their education					
Percentage of graduates who owed only non-government student debt	percent	11	11	12	10
Average debt owed to non-government sources at time of graduation	dollars	9,300	14,100	20,100	16,800
Percentage of graduates with debt who had paid it off two years after graduation	percent	41	45	41	42
Average debt remaining two years after graduation for those who still owed	dollars	9,200	15,700	18,200	15,300
Graduates who owed to both government and non-government sources for their education					
Percentage of graduates who owed both government and non-government student debt	percent	9	15	10	10
Average debt owed to both sources at time of graduation	dollars	22,600	37,000	37,800	43,700
Percentage of graduates with debt who had paid it off two years after graduation	percent	9 E	12	16	12
Average debt remaining two years after graduation for those who still owed	dollars	21,300	31,600	35,100	40,600

E use with caution

Note: Graduates who pursued further education after their 2005 graduation are excluded from this table.
Averages and numbers are rounded to the nearest 100, but analysis is carried out on unrounded values.

Source: Statistics Canada, National Graduates Survey (Class of 2005).

Table A.8 (concluded)

Profile of 2005 graduates who owed money to government student loans at graduation, by level of study

		Graduates with debt remaining two years after graduation	Graduates without debt two years after graduation	Total graduates owing at graduation
Master				
Number of graduates	number	**5,500**	**2,700**	**8,200**
Average debt at graduation	dollars	21,100	14,200	18,800
Large debt at graduation – $25,000 and over	percent	32	17	27
Average debt two years after graduation	dollars	15,800	0	10,600
Large debt two years after graduation – $25,000 and over	percent	20	...	14
Percentage of debt paid off two years after graduation	percent	25	100	44
Reported difficulties repaying debt	percent	27	16	23
Employed in 2007	percent	90	96	92
Without income in 2006	percent	F	x	F
Average amount paid in 2006	dollars	2,800	...	...
Average income in 2006	dollars	43,200	54,700	46,900
Ratio of debt payments to income	ratio	6	...	...
Debt servicing ratio – 25th percentile	ratio	2	...	...
Debt servicing ratio – Median	ratio	5	...	...
Debt servicing ratio – 75th percentile	ratio	9	...	...
Average age at graduation	years	29	29	29
Median age at graduation	years	27	28	27
Married or living common-law	percent	56	56	56
With dependent children	percent	28	30	28
With previous postsecondary education	percent	98	98	98
Doctorate				
Number of graduates	number	**700**	**300**	**1,100**
Average debt at graduation	dollars	25,300	17,300	22,900
Large debt at graduation – $25,000 and over	percent	40	24	35
Average debt two years after graduation	dollars	19,700	0	13,700
Large debt two years after graduation – $25,000 and over	percent	27	...	19
Percentage of debt paid off two years after graduation	percent	22	100	40
Reported difficulties repaying debt	percent	28	17	25
Employed in 2007	percent	90	93	91
Without income in 2006	percent	1 E	x	1 E
Average amount paid in 2006	dollars	3,400	...	...
Average income in 2006	dollars	53,900	57,500	55,000
Ratio of debt payments to income	ratio	6	...	...
Debt servicing ratio – 25th percentile	ratio	3	...	...
Debt servicing ratio – Median	ratio	5	...	...
Debt servicing ratio – 75th percentile	ratio	8	...	...
Average age at graduation	years	34	34	34
Median age at graduation	years	32	33	32
Married or living common-law	percent	70	76	72
With dependent children	percent	44	54	47
With previous postsecondary education	percent	100	100	100

... not applicable
0 true zero or a value rounded to zero
x suppressed to meet the confidentiality requirements of the *Statistics Act*
E use with caution
F too unreliable to be published

Note: Graduates who pursued further education after their 2005 graduation are excluded from this table.
Averages and numbers are rounded to the nearest 100, but analysis is carried out on unrounded values.

Source: Statistics Canada, National Graduates Survey (Class of 2005).

Table A.9 (concluded)

Profile of 2005 graduates who owed money to government student loans at graduation, by level of study and size of debt

		Small	Medium	Large
		Less than $10,000	$10,000 to $24,999	$25,000 and over
Master				
Number of graduates	number	2,300	3,700	2,200
Percentage of graduates with debt	percent	28	45	27
Average debt at graduation	dollars	5,600	15,800	37,500
Without debt two years after graduation	percent	49	31	20
Reported difficulties repaying debt	percent	8 E	22	41
Average debt at graduation for those who still owe two years after graduation	dollars	6,000	16,100	38,300
Average debt at graduation for those without debt two years after graduation	dollars	5,100	15,100	34,300
Average remaining debt two years after graduation for those who still owe	dollars	4,000	11,400	29,900
Employed in 2007	percent	94	91	92
Without income in 2006	percent	x	F	F
Average amount paid in 2006	dollars	1,200	2,400	4,500
Average income in 2006	dollars	47,700	46,400	46,600
Ratio of debt payments to income	ratio	3	5	10
Debt servicing ratio – 25th percentile	ratio	2	3	4 E
Debt servicing ratio – Median	ratio	3	5	9
Debt servicing ratio – 75th percentile	ratio	4	7	13
Average age at graduation	years	29	29	30
Median age at graduation	years	27	27	28
Married or living common-law	percent	58	56	54
With dependent children	percent	29	28	28
With previous postsecondary education	percent	97	99	96
Doctorate				
Number of graduates	number	200	500	400
Percentage of graduates with debt	percent	21	43	35
Average debt at graduation	dollars	6,000	16,200	41,200
Without debt two years after graduation	percent	49	29	21
Reported difficulties repaying debt	percent	12	22	36
Average debt at graduation for those who still owe two years after graduation	dollars	6,200	16,500	42,200
Average debt at graduation for those without debt two years after graduation	dollars	5,800	15,300	37,300
Average remaining debt two years after graduation for those who still owe	dollars	4,200	12,500	33,400
Employed in 2007	percent	92	91	91
Without income in 2006	percent	x	x	x
Average amount paid in 2006	dollars	1,200	2,600	5,300
Average income in 2006	dollars	52,400	55,300	56,200
Ratio of debt payments to income	ratio	2	5	9
Debt servicing ratio – 25th percentile	ratio	1	3	4
Debt servicing ratio – Median	ratio	2	4	7
Debt servicing ratio – 75th percentile	ratio	3	7	11
Average age at graduation	years	33	34	35
Median age at graduation	years	32	32	33
Married or living common-law	percent	74	72	70
With dependent children	percent	49	50	42
With previous postsecondary education	percent	100	100	100

x suppressed to meet the confidentiality requirements of the *Statistics Act*
E use with caution
F too unreliable to be published
Note: Graduates who pursued further education after their 2005 graduation are excluded from this table.
Averages and numbers are rounded to the nearest 100, but analysis is carried out on unrounded values.
Source: Statistics Canada, National Graduates Survey (Class of 2005).

Table A.10 (concluded)

Profile of debt to government student loan programs for 2005 graduates, by level of study and field of study (major fields and selected minor fields)

	Total number of graduates	Debt owing at graduation	Debt profile of graduates who owed at graduation: Average owed at graduation	Without debt two years after graduation	Reporting difficulties repaying debt	Large debt at graduation – $25,000 and over	Average remaining debt for those who still owed years after graduation
	number	percent	dollars	percent	percent	percent	dollars
Master							
Total	**24,800**	**34**	**18,800**	**33**	**23**	**27**	**15,800**
Education	3,600	22	19,200	35	30 E	31 E	15,100
Visual and performing arts, and communications technologies	500	51	19,300	21 E	46	30	17,800
Humanities	1,600	38	20,500	29 E	32 E	30 E	19,600
Social and behavioural sciences, and law	2,900	45	19,200	22 E	21 E	28	15,500
Business, management and public administration	7,400	25	17,400	33	19 E	25 E	14,500
Physical and life sciences, and technologies	1,200	36	16,000	35	19 E	24	13,000
Mathematics, computer and information sciences	1,400	43	20,100	32	27	30	16,300
Mathematics and statistics and related interdisciplinary fields	200	25 E	18,400	x	x	x	12,600 E
Computer and information sciences and support services and related interdisciplinary fields	900	46	20,200	37	25 E	28	16,300
Library science	400	42	20,400	23 E	34 E	32 E	17,400
Architecture, engineering and related technologies	3,000	41	19,600	44	25	26	18,000
Architecture and related services and related interdisciplinary studies	600	60	24,400	22 E	23 E	30 E	20,900
Engineering	2,300	37	17,700	52	26	24 E	16,300
Agriculture, natural resources and conservation	600	46	18,600	33	25	26	15,800
Agriculture, agricultural operations, and related sciences	200	42	18,600	39 E	17 E	27 E	13,900
Natural resources and conservation	400	48	18,700	31	28	25	16,500
Health, parks, recreation and fitness	2,200	45	19,200	35	15 E	25	14,600
Other health professions and related clinical sciences	1,600	50	19,400	29	12 E	24	14,700
Parks, recreation, leisure and fitness studies	200	51	12,900	40 E	x	x	12,600 E
Personal, protective and transportation services	100	23	19,200	47 E	x	x	14,700
Doctorate							
Total	**3,200**	**34**	**22,900**	**30**	**25**	**35**	**19,700**
Education	300	21	23,000	36	32	34	16,900
Visual and performing arts, and communications technologies	100	41	24,500	30 E	x	45	23,500
Humanities	300	44	24,500	22	38	38	20,600
Social and behavioural sciences, and law	700	48	25,300	30	23	41	21,900
Business, management and public administration	100	29	17,900	28 E	32 E	x	15,200
Physical and life sciences, and technologies	800	32	19,200	35	20	29	17,200
Mathematics, computer and information sciences	200	26	24,000	23 E	x	36	19,800 E
Architecture, engineering and related technologies	400	23	19,800	38	18	28	16,500
Engineering	400	22	20,200	40	19	28	16,900
Agriculture, natural resources and conservation	100	32	21,900	x	41	32	17,300
Health, parks, recreation and fitness	300	29	23,400	32	21	41	19,000
Other health professions and related clinical sciences	200	27	19,500	33	x	33	15,400
Personal, protective and transportation services	x	x	x	x	x	x	x

x suppressed to meet the confidentiality requirements of the *Statistics Act*

E use with caution

F too unreliable to be published

Note: Graduates who pursued further education after their 2005 graduation are excluded from this table.

The sum of graduates by major field of study may not add up to the total number of graduates due to the fact that the field of study could not be coded for some graduates.

Averages and numbers are rounded to the nearest 100, but analysis is carried out on unrounded values.

Source: Statistics Canada, National Graduates Survey (Class of 2005).

AGENDA

Caucuses: Colleges and Institutes, Large Institutes, and Small Universities

May 2009 National General Meeting

1. **INTRODUCTIONS and OVERVIEW OF CAUCUS MEETING**
   a. **Roundtable Introductions**
   b. **Review of the Caucus Agenda**
   c. **Review of the Caucus Terms of Reference**

2. **SELECTION OF REPRESENTATIVES TO SERVE ON PLENARY SUB-COMMITTEES**

   Standing Resolution 1, Section 2, *Committee Composition* states that:
   "Each caucus, constituency group and provincial component shall have the right to select one voting member to sit on each standing general meeting committee."

   The Caucus will select representatives for each of the following plenary sub-committees:
   - Budget Committee;
   - Organisational and Services Development Committee; and
   - Policy Review and Development Committee.

3. **REVIEW OF MOTIONS FOR CONSIDERATION**

   The Caucus will review the motions that were served with notice for consideration at the May 2009 general meeting for the purpose of giving general direction to the Caucus' representatives on the committees.

4. **OTHER BUSINESS**

5. **ADJOURNMENT**

AGENDA
Constituency Groups
May 2009 National General Meeting

1. **INTRODUCTIONS and OVERVIEW OF CONSTITUENCY GROUP MEETINGS**
   a. **Roundtable Introductions**
   b. **Review of the Constituency Group Agenda**
   c. **Review of the Constituency Group Terms of Reference**

2. **SELECTION OF REPRESENTATIVES TO SERVE ON PLENARY SUB-COMMITTEES**

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