

NORTH ISLAND COLLEGE



2017/18 Environmental Scan

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Institutional Overview

North Island College (NIC) is a comprehensive community college with a service area that spans approximately 80,000 km² on central and northern Vancouver Island and parts of the B.C. mainland coast from Desolation Sound to Klemtu (see Figure 1). With 157,000 residents in its region, NIC serves the largest population of all B.C. rural colleges. The College is honoured to acknowledge operations within the traditional territories of 35 First Nations inclusive of the Nuu-chah-nulth, Kwakwaka'wakw and Coast Salish traditions.

Established in 1975 as a distance education institution serving rural and remote areas of central and northern Vancouver Island, the story of NIC is one of innovation, change, challenge, and success. The College began building permanent campuses in the 1990s and now operates four campuses in Campbell River, Comox Valley, Port Alberni and Mount Waddington. The College also operates a learning centre in Ucluelet.

NIC offers a full range of campus-based pathway programming as well as educational, financial aid, disability, counseling, and student advising services, including a dedicated Student Employment Services department that supports nationally accredited co-operative education programs. In keeping with its access-focused roots, NIC serves its diverse and geographically dispersed communities through technology-enabled distance learning and face-to-face in-community programming, which are based on specific local needs and delivered onsite at community and First Nations partners' locations.



Figure 1, North Island College Region

Governance

Board of Governors

NIC's Board of Governors is empowered by B.C.'s *College and Institute Act* to manage, administer, and direct the affairs of the institution in the areas of property, revenue, expenditure, business, and other matters within the context of process and duties afforded it. The Board of Governors is made up of nine government appointed members, one elected faculty member, one elected staff member and two elected student members. The Chair of the Education Council and the President are ex-officio Board Members.

The Board's primary responsibility is to oversee the strategic direction and management of the College and ensure it carries out its mission. To that end, the primary functions and roles of the Board are to establish the institution's purpose and direction, to ensure the institution is effectively and efficiently managed, to establish policies that have institution-wide application, and to provide effective communication with the community.

Senior Leadership Team

NIC's President and CEO heads the College's Senior Leadership Team, which has two primary responsibilities: 1) lead the educational and administrative functions of the College through the establishment of institutional priorities and directions; and 2) ensure institutional accountability and adherence to legislative and Ministry of Advanced Education policies and directives.

Education Council

North Island College's Education Council is established by the provincial *College and Institute Act* and is made up of faculty members, administration and support staff and student representatives. The Council's role is to ensure educational quality at NIC.

The Education Council serves two main functions:

- To review and approve curriculum and policies that relate to academic standing, academic standards and evaluation of student performance, and
- To advise the Board of Governors on the development of educational policy (e.g. related to the implementation and/or cancellation of courses and programs, evaluation of programs and educational services, terms of affiliation with other post-secondary bodies, qualifications for admission policies and criteria for awarding certificates, diplomas and degrees).

Programs

To meet the education and training needs of the region, NIC offers a broad range of programs tailored to the needs of current and future students. Programming includes: adult upgrading (including adult basic education, English language training and access for students with disabilities); university transfer; business; tourism; health care; fine arts; Aboriginal education; and Industry Training Authority (ITA) approved foundation trades, technical, and apprenticeship training. The College also offers a significant range of sector-specific training to support local industry and communities. NIC also hosts and supports ElderCollege, which provides lectures and courses on a wide range of topics at low cost for individuals 50 years of age and older (55+ at the Comox Valley Campus).

As shown in Figure 2, University Studies and Business and Tourism programs together constitute approximately one-quarter of NIC’s programming, Trades and Apprenticeships combined make up nearly one-third, Adult Upgrading makes up one-sixth, career programs and industry training make up just under one-sixth, and Nursing and Health Related programs make up just under one-tenth.

By working closely with our community, industry and educational partners, NIC ensures that programs and institutional resources are aligned with regional economic and labour market needs. NIC develops innovative ways to deliver responsive programming on a when-needed, where-needed basis. Curriculum, programs, and services that respond to the shifting occupational structure of the North Island region are continuously in development. Many of these programs are aimed at meeting the training needs of transitioning primary industry workers.

More information about NIC’s program offerings can be found online by visiting <http://www.nic.bc.ca/programs/default.aspx>. A complete list of NIC’s current Canadian post-secondary, international, community, and school district partnership agreements can be found online at <http://www.nic.bc.ca/about-us/the-nic-commitment/partnership-agreements>.

Scholarships

Established in 1991, the North Island College Foundation is a non-profit body with a primary objective of raising funds to support scholarships and bursaries and a secondary objective of fundraising for needed equipment and educational resources. Governed by a volunteer board of directors made up of community leaders from the College region, the Foundation actively seeks donations for the College.

The NIC Foundation will award over \$375,000 in scholarships and bursaries. Students can now apply for more than 415 awards, valued up to \$5,000, up significantly from the 2016/17 record of \$290,000 awarded. The awards are available to students coming directly from high school, students retraining for a new career as well as those who are halfway through their programs or graduating.

Student Population

A total of 8,369 students took courses at NIC in 2017/18, with 4,633 students enrolled in credit courses and 3,736 students enrolled in only short-duration courses such as community education, first aid, marine or industry training. Figure 3 disaggregates enrolment by type of course (short duration or credit) and mode of delivery (campus-based, in-community and distributed learning).

The demographic characteristics of students at NIC has, over the last few years, been relatively stable in terms of median age and male-to-female ratio. The median age of students in credit courses in 2017/18 was 25 years and 58% were female (42% male). Students enrolled in short-duration, non-credit courses,

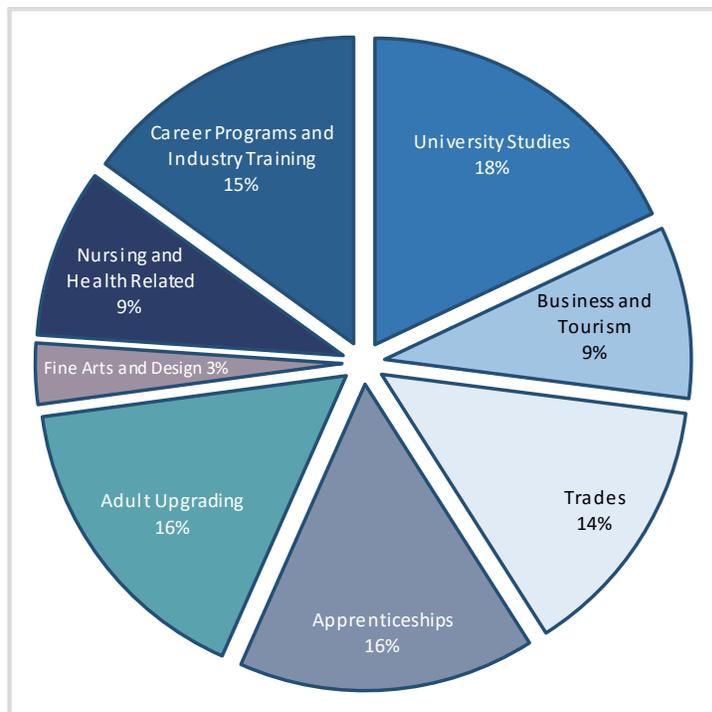


Figure 2, Full-Time Equivalent Enrolments in NIC’s Major Program Areas

which tend to be interest-based or offer retraining for workers already in the labour market, had a median age of 40, with nearly equal numbers of females and males.

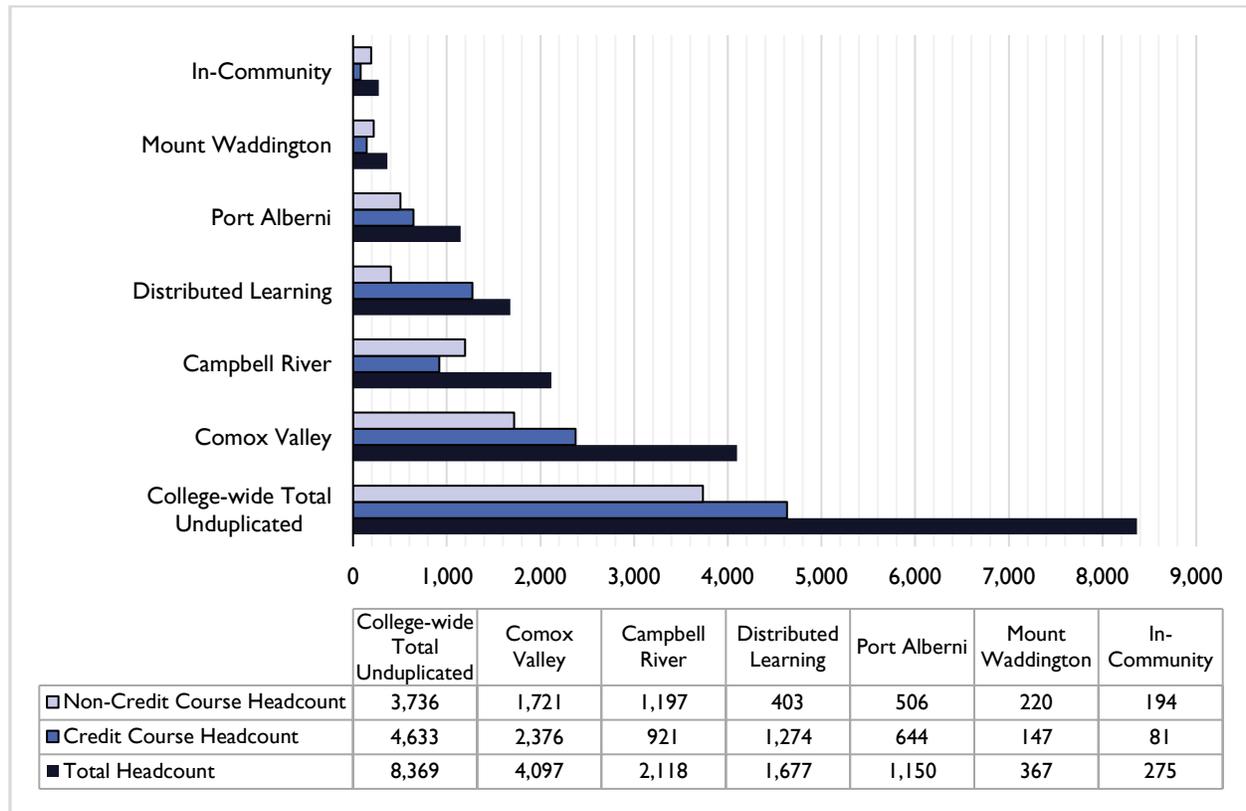


Figure 3, 2017/18 Unduplicated Headcount by Location and Course Type, NIC

Nine-tenths of NIC students are local residents of the College’s catchment area: the North Island and Central Coast. Half of the remaining students come from other parts of Vancouver Island. A growing international student population is enhancing cultural diversity at NIC from a global perspective.

As shown in Figure 3, of the 8,369 students who took courses at NIC, just under half took courses at the Comox Valley campus, around a quarter took courses at the Campbell River campus, a fifth engaged in distributed learning, just under 14% took courses at the Port Alberni campus, just over 4% took courses at the Mount Waddington campus, and just over 3% accessed courses face-to-face in-community.

Aboriginal Students

Students of self-declared Aboriginal ancestry make up 16% of NIC’s domestic student population,¹ exceeding the proportion of Aboriginal people living in the College’s service area (13%). As the map of First Nations and traditional territories below makes clear (see Figure 4), First Nations communities are located throughout the NIC region and many are not within commutable proximity to one of NIC’s four campuses. To increase access and relevance for Aboriginal learners, the College is committed to a regional delivery model of education whereby programming and instruction are delivered face-to-face in

¹ As a percentage of total domestic student full-time equivalent enrolments.

Aboriginal communities in partnership with First Nations based on specific community economic and social needs.



Figure 4, First Nations Communities, North Island College Region

International Students

NIC hosted 496 international students from 37 countries in 2017/18, including India (336), China (44), Japan (23) and Philippines (15). As a proportion of all students at NIC, international students grew from 4% in 2013/14 to 11% in 2017/18. Growth in international student headcount and FTEs over the past five years is shown in Figure 5.

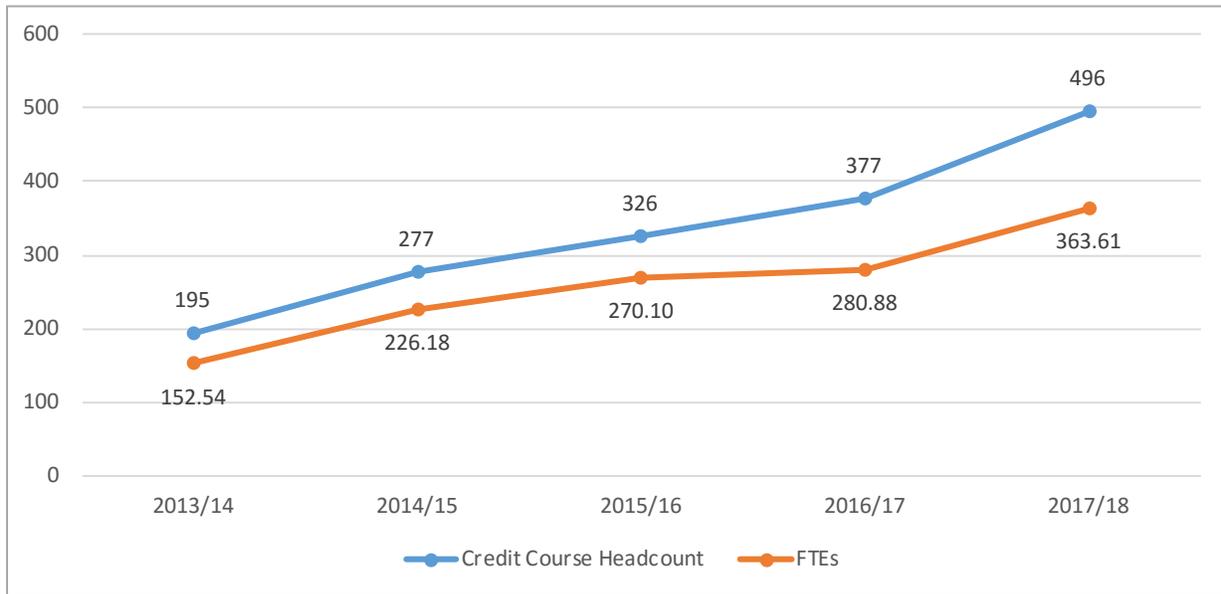


Figure 5, NIC International Student Headcount in Credit Courses and FTEs, 2012/13 – 2017/18

International student enrolment has been concentrated in four main program areas for the past five years: university studies, business, English as a second language, and tourism. In 2017/18, 76% of international students took courses in university studies, 63% in business, 13% took courses in English as a Second Language, and 16% took courses in tourism.

Continuing Education Students

A total of 4,615 students at NIC took at least one course offered through NIC’s Continuing Education and Training department in 2017/18. This means that more than half (55%) of NIC students accessed continuing education and training courses, many of whom are taking academic credit programs. The vast majority of students enrolled in non-credit general interest, ElderCollege, short-term vocational, and first aid courses; however, 338 students were also enrolled in credentialed programming offered through NIC’s Continuing Education and Training department.

Understanding the North Island

Current and Historic Population

Based on 2016 Census data provided by Statistics Canada,² there was an overall increase in the population of the NICR between 2011 and 2016 from 154,919 to 156,533 while the province as a whole grew slightly. Stability in population exists in some regional districts and communities, but others are experiencing decline. In particular, some pulp-and-paper and/or extractive dependent communities like Port Alice and Port McNeill have experienced declines in their overall population. This pattern is not uniform across natural-resource dependent communities and regions, however, with Campbell River growing modestly. Tofino, a key tourist destination, grew around 3% between 2011 and 2016.

Population changes for regional districts (RD) within the NICR between 2011 and 2016 were as follows: Comox Valley RD grew by just under 3,000 people to approximately 66,500; Strathcona RD grew by 1,400 people to around 44,700; Alberni-Clayoquot Regional District (RD) was virtually unchanged at around 31,000 people; Mount Waddington RD declined by 470 people to 11,000; and Central Coast RD grew very slightly to just over 3,300 people.

According to the 2016 Census data, there are just over 21,000 people who identify as Aboriginal living in the NIC Region (NICR), which includes over 16,000 First Nations and around 4,000 Métis.³ Significantly higher than the provincial average of around 6%, Aboriginal people account for about 13% of the NICR population. The Aboriginal population in the NICR is younger than the overall average as of 2016, with 15-24 year-olds making up around 16% of the Aboriginal population and 9% of the overall population. In relation to the regional districts (RD) within the NICR, the largest number of Aboriginal people live in the Alberni-Clayoquot RD (6,040) and then Strathcona RD (5,855) where they comprise 29% and 28% of the respective regional populations.

Projected Population Change

Between 2019 and 2024 the population of the North Island College region (NICR)⁴ is expected to increase by about 6,000 people (4.0%). Data in Table 1 suggest that population growth is anticipated for all regional districts in the NICR. The Comox Valley and Strathcona regional districts (RDs) are expected to grow by approximately 4,000 and 1,400 people (6.0% and 3.0%), respectively. Alberni-Clayoquot RD is expected to grow by just over 600 people and has the lowest projected rate of growth (2.1%). Mount Waddington RD is expected to grow by just under 400 people (3.2%) and Central Coast RD is expected to grow by approximately 141 people (4.2%).

² Statistics Canada (2016). *B.C. Regional District Population Estimates 2011-2016*. Retrieved from <http://www12.statcan.gc.ca/census-recensement/2016/dp-pd/prof/search-recherche/lst/results-resultats.cfm?Lang=E&TABID=1&G=1&Geo1=&Code1=&Geo2=&Code2=&GEOCODE=59> on November 13, 2017.

³ <http://www12.statcan.gc.ca/census-recensement/2016/dp-pd/prof/search-recherche/lst/results-resultats.cfm?Lang=E&TABID=1&G=1&Geo1=&Code1=&Geo2=&Code2=&GEOCODE=59> on November 15, 2017.

⁴ BC Stats table from P.E.O.P.L.E. 2017. Retrieved from <http://bcstats.gov.bc.ca/StatisticsBySubject/Demography/PopulationProjections.aspx> on August 21, 2017

	2019	2024	# Change	% Change
Alberni-Clayoquot	31,095	31,736	641	2.1%
Central Coast	3,373	3,514	141	4.2%
Comox Valley	67,139	70,986	3,847	5.7%
Mount Waddington	11,344	11,712	368	3.2%
Strathcona	47,116	48,539	1,423	3.0%
NICR Total	160,067	166,487	6,420	4.0%
BC Total	4,925,605	5,220,483	294,878	6.0%

Table 1, North Island College Region Population Projections, 2019-2024

NICR Population Projections by Age Group

Like the rest of the province, the NICR's population structure is aging, with those 65+ increasing as a proportion of the total population. The number of 18-24-year-olds, the traditional demographic for post-secondary education, is expected to shrink from around 11,800 to around 11,000 between 2019 and 2024, a drop of about 7%.⁵

For 18-24 year-olds, the Comox Valley is expected to decrease by 7% (330 individuals) to around 4,500; Strathcona is expected to decrease by just under 7% (220 individuals) to around 3,200; Alberni-Clayoquot is expected to drop approximately 10% (240 individuals) to around 2,200; Mount Waddington RD is expected to increase by 3% to approximately 900; and the Central Coast is expected to increase around 2% to approximately 250.

School District Enrolment

The overall number of secondary school students in the NICR is expected to begin a slow recovery after declining over the last decade.⁶ As Figure 6 suggests, projections show a slight decrease in secondary student (grades 8-12) enrolment in 2018/19 followed by modest growth to 2026/27. Elementary student (grades K-7) enrolment is expected to continue to increase in 2018/19 and remain fairly consistent

⁵ Custom table created by BC Stats using P.E.O.P.L.E. 2017.

⁶ B.C. Ministry of Education (March, 2018). *Projection Report for Public School Headcount Enrolments: 2016/17*. Retrieved January 16, 2018, from <https://catalogue.data.gov.bc.ca/dataset/projection-of-public-school-aged-headcount-enrolments/resource/81bbfda1-b5e7-4dfd-9d91-b28032284851>

through to 2026/27.

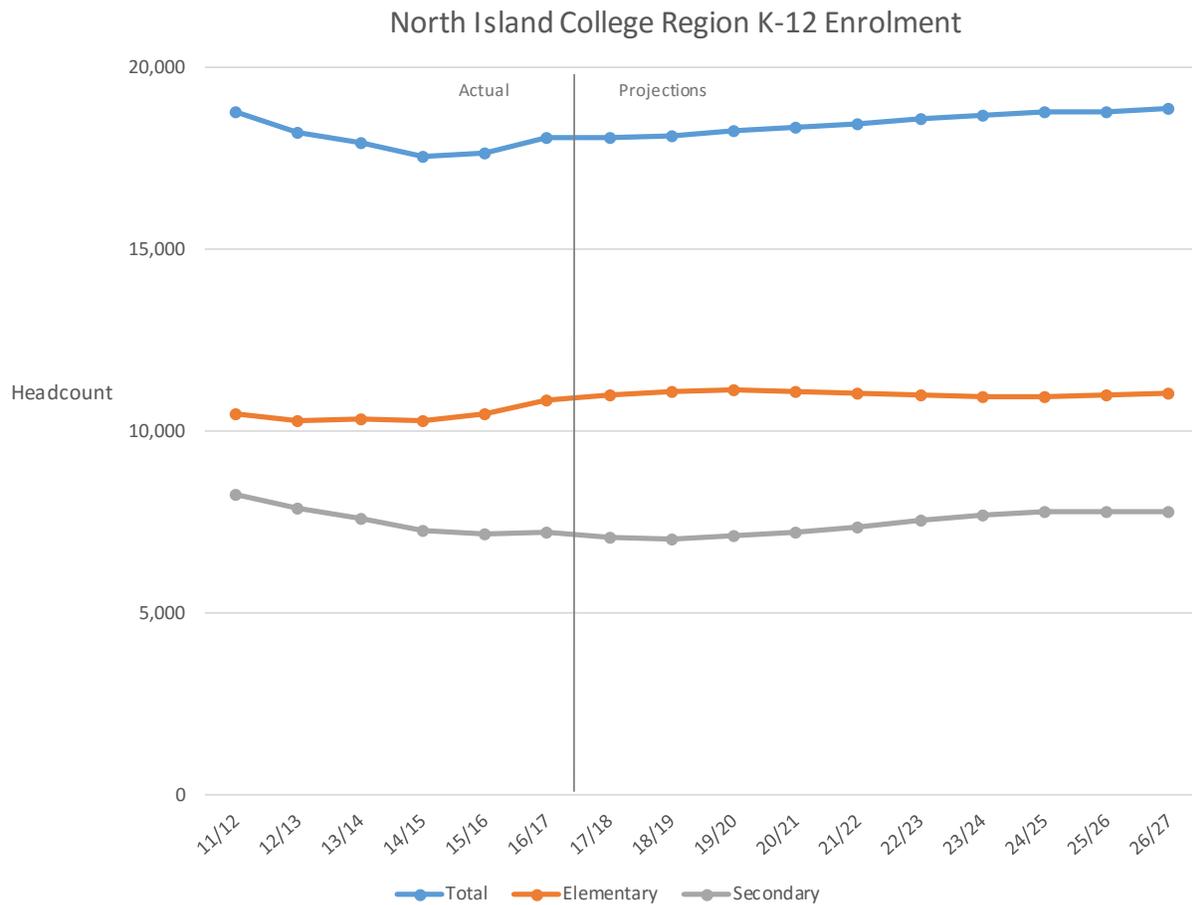


Figure 6, K-12 Enrolment in the North Island College Region

NIC generally draws students from six school districts (SDs): Central Coast (SD 49), Alberni (SD 70), Comox Valley (SD 71), Campbell River (SD 72), Vancouver Island West (SD 84), and Vancouver Island North (SD 85).⁷ Districts vary significantly in size with nearly half of all students in the NIC catchment area enrolled in the Comox Valley. About a quarter are enrolled in Campbell River, about a fifth are enrolled in Alberni, and much smaller numbers come from Vancouver Island West, Vancouver Island North, and Central Coast.

Figure 7 shows enrolment for the individual school districts. Rates of growth and decline are uneven across the six school districts. Among the bigger districts Comox Valley is expected to experience a noticeable increase in K-12 enrolments after 2017/18. Campbell River is expected to drop slightly in 2018/19 before recovering and gradually increasing through to 2026/27. Alberni is expected to follow a similar trend to Campbell River.

⁷ B.C. Ministry of Education (January 2017). *Projection Report for Public School Aged Headcount Enrolments (excludes adults): 2016/17*. Retrieved from <https://catalogue.data.gov.bc.ca/dataset/projection-of-public-school-aged-headcount-enrolments/resource/81bbfda1-b5e7-4dfd-9d91-b28032284851f> on January 20th, 2018.

Among the smaller districts, Central Coast and Vancouver Island West are predicted to stay at current levels while Vancouver Island North is expected to maintain a relatively steady stream of enrolments before decreasing slightly.

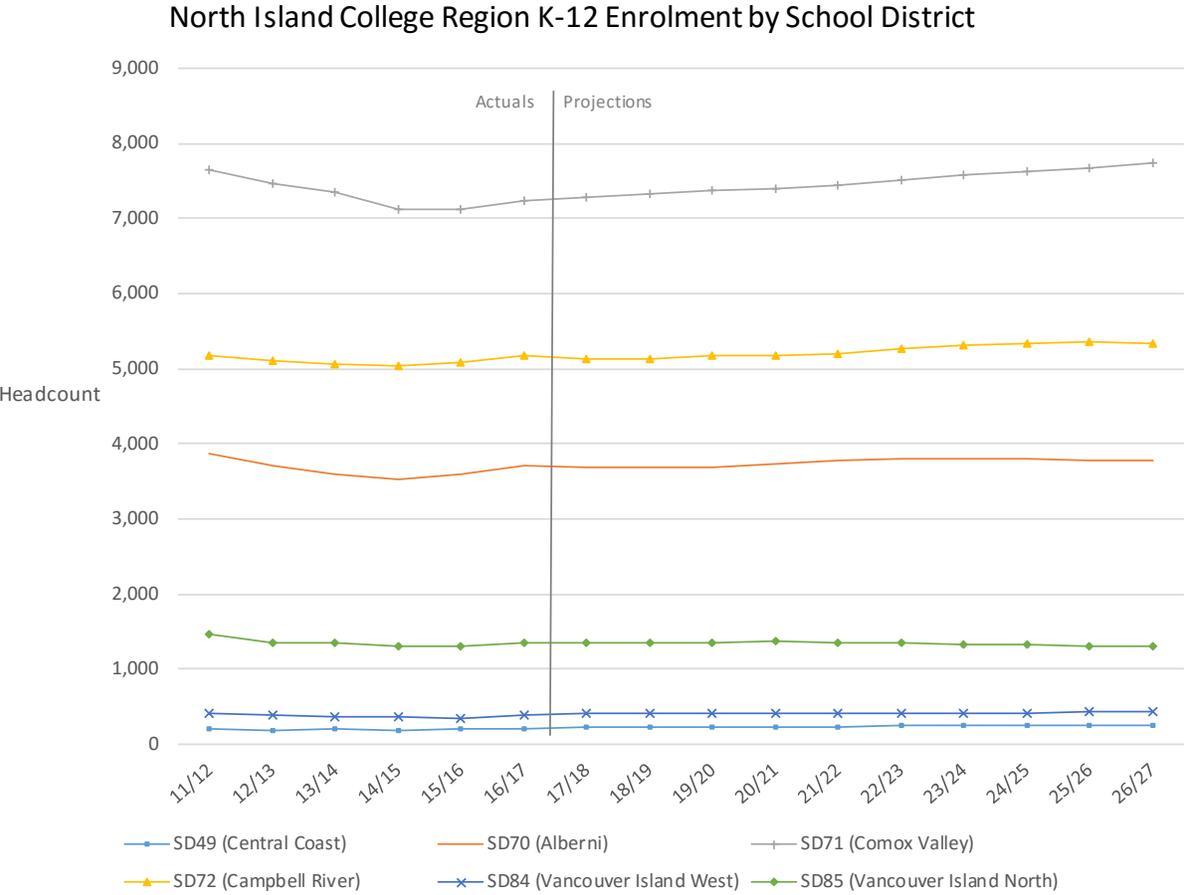


Figure 7, K-12 Enrolment in the North Island College Region by School District

Educational Attainment & Completion

Compared with provincial levels, high school students in the region served by North Island College are considerably less likely to graduate and there is a higher proportion of individuals aged 25-64 with no high school diploma living in the region. Relatively low levels of high school completion mean that young adults in the region are less prepared to enter post-secondary education and the workforce, highlighting the importance of NIC’s adult upgrading programming. Tuition free Adult Basic Education programming offered locally by the College is also important for older adults who may be changing careers later in life whether they require high school upgrading to transition into new jobs or are choosing to enter a post-secondary program.

Post-secondary credential completion is also lower than provincial levels among 25-64 year olds in the North Island College region. Given that more than three-quarters of expected job openings in the province over the next ten years are expected to require some form of post-secondary credential, it is important for the region’s residents to have access to high quality, relevant and affordable post-secondary education.

It is noteworthy that there is considerable variation among regional districts in the North Island College region with rural areas showing substantially higher levels of educational non-completion (both high school and post-secondary) than those seen in the province overall.

High School Non-Graduation

The Ministry of Education's Six-Year Dogwood Completion Rate tracks B.C. students entering grade eight who graduate with a B.C. Certificate of Graduation ("Dogwood") or B.C. Adult Graduation Diploma ("Adult Dogwood") within six years. Based on this metric, over one-quarter (27%) of grade eight students in the North Island College region do not graduate high school versus 16% for the province overall.⁸

High School and Post-Secondary Non-Completion

Data from the 2016 Census show that the percentage of 25-64 year olds living in the North Island College region who don't have at least a high school diploma is 13% compared with 10% provincially.⁹ The variation among regional districts within the region is considerable, ranging from approximately 23% for Mount Waddington and Central Coast to 9% in the Comox Valley. Strathcona and Alberni-Clayoquot are in the middle at 12% and 18%, respectively.

The 2016 Census also found that the percentage of 25-64 year olds living in the North Island College region who do not have a post-secondary credential is 43% compared with 37% provincially.¹⁰ Among regional districts within the region served by the College, the percentage of individuals with no post-secondary credentials is highest in Mount Waddington and the Central Coast, both at 52%, and lowest in the Comox Valley at 38%; Strathcona and Alberni-Clayoquot are in the middle at 44% and 48%, respectively.

Occupational Opportunities

It is forecast that between now and 2027, there will be 917,000 job openings in B.C.; it is estimated that 78% of jobs will require some post-secondary education and training.¹¹ As shown in Figure 8, the largest share (42%) will likely be occupations requiring a diploma, certificate or apprenticeship training. The second largest share (36%) will be in occupations that require a bachelor's, graduate or first professional degree and/or significant work experience. Approximately 70% of these job openings are expected to come from workers leaving the work force, mostly through retirement, with the remaining 30% from new jobs.

⁸ DataBC (2018). Retrieved from <https://catalogue.data.gov.bc.ca/dataset/1c6256d0-c120-4de1-817b-fb291732f8a4> on April 2, 2018.

⁹ 2016 Statistics Canada Census data. Retrieved from <https://catalogue.data.gov.bc.ca/dataset/bc-schools-six-year-completion-rate> on March 20, 2018.

¹⁰ Ibid.

¹¹ WorkBC (2017). *British Columbia 2027 Labour Market Outlook*. Retrieved https://www.workbc.ca/getmedia/66fd0e7c-734e-4fcb-b1a6-0454862525a6/BC_Labour_Market_Outlook_2017_Edition_Nov_2017.PDF.aspx on March 7, 2018.

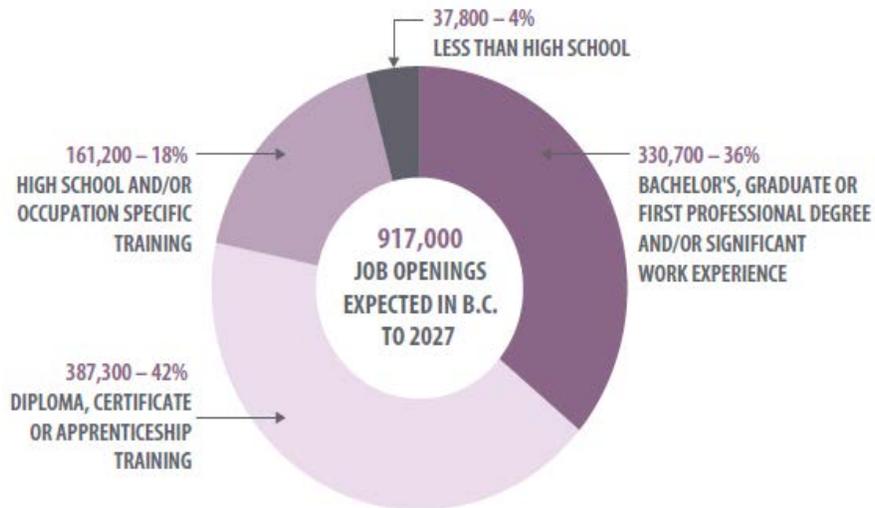


Figure 8, Ten-Year Total Job Openings by Educational Requirement

Regionally, a long-term labour market outlook through 2027 is available for the larger Vancouver Island / Coast development region (VICR), of which the North Island College region is a part. The VICR aggregates the NICR with the South-Central Coast and South Island, including Victoria and Nanaimo, to form the second largest development region in B.C. by population. The number of projected job openings in the VICR through 2027 is 133,800, accounting for 15% of expected job openings across the province. More than three quarters of job openings (77%) will replace retiring workers, substantially higher than the provincial figure of 70%, reflecting the region’s older population demographic. The main sources of employment are in the Health Care and Social Assistance, Wholesale and Retail Trade, and the Construction sectors.

Growth in employment demand for the VICR is projected to increase by an annual average of 0.8% through 2027, slower than the provincial average. Employment in the region remains heavily weighted toward services-based employment as shown in Table 2, which lists the top ten industries ranked by forecast job openings through 2027. The region’s fastest growth is expected to be in Nursing and Residential Care Facilities, Computer Systems Design and Related Services as well as Other Transportation industries. This reflects the region’s older population but also an anticipated overspill of younger workers coming from the lower mainland area.

Table 2, Top Ten Industries with Projected Job Openings in the VICR through 2027

INDUSTRY	EMPLOYMENT	EMPLOYMENT GROWTH (AVERAGE ANNUAL GROWTH RATE)			EXPANSION	REPLACEMENT	JOB OPENINGS
		2017	2017-2022	2022-2027			
Construction	4,750	4.3%	-0.5%	1.9%	1,010	1,570	2,580
Other Retail Trade	4,180	0.2%	1.1%	0.6%	260	870	1,130
Other Private Services	3,360	1.1%	0.7%	0.9%	320	820	1,130
Support activities for mining and oil and gas extraction	2,170	3.3%	-0.4%	1.5%	340	750	1,090
Truck transportation	2,050	0.7%	1.1%	0.9%	190	680	870
Oil and gas extraction	1,580	2.9%	0.4%	1.6%	280	570	860
Food services and drinking places	2,880	1.2%	1.3%	1.3%	390	400	790
Elementary and secondary schools	1,740	0.6%	0.2%	0.4%	70	630	700
Wholesale Trade	1,370	1.8%	1.1%	1.5%	220	430	650
Management of Companies and Enterprises & Administrative and Support	1,150	2.0%	1.4%	1.7%	210	350	560

Table 3 breaks out forecast jobs for the VICR at the most detailed four-digit National Occupational Classification (NOC) levels, grouping occupations by type and level of education and then ranking them within those groupings by largest number of job openings through 2027. Reflecting and expanding on the findings on job openings in the industry forecast, this more detailed view of the data shows that almost all of these regionally high demand jobs are in service, health, community care, and construction fields. As the primary provider of public post-secondary education and training in the NICR, it is important that North Island College maintain relevance to local labour market demand. The College currently offers programs that directly lead to all of the jobs usually requiring diploma, certificate, or apprenticeship training (Level B) in Table 3. For jobs usually requiring a bachelor's, graduate, or first professional degree (Level A), NIC either offers programs directly leading to those jobs (i.e. nursing and interactive media developers) or pathway programming in partnership with other post-secondary institutions on Vancouver Island. NIC also serves an important role regionally in preparing individuals for jobs in the Level C and Level D categories, which typically do not require post-secondary education, via its adult upgrading, accessible learning, and continuing education programming. Jobs in the Level O category usually require a combination of education and experience, and NIC's tourism, business, and trades programs are of particular relevance to those high demand jobs identified in Table 3.

Table 3, Occupations with the Largest Number of Job Openings by Skill Level in the VICR through 2027

THE OCCUPATIONS WITH THE LARGEST NUMBER OF JOB OPENINGS IN THE REGION ARE:						
SKILL LEVEL	NOC	OCCUPATION	EMPLOYMENT 2017	EXPANSION 2017-2027	REPLACEMENT 2017-2027	JOB OPENINGS 2017-2027
LEVEL 0: <i>Usually requiring combination of education and experience</i>	0621	Retail and wholesale trade managers	9,220	520	3,440	3,960
	0631	Restaurant and food service managers	2,810	380	840	1,230
	0121	Insurance, real estate and financial brokerage managers	1,650	230	840	1,070
	0711	Construction managers	2,230	-10	890	890
	0632	Accommodation service managers	1,180	160	470	630
LEVEL A: <i>Usually requiring a Bachelor's, Graduate or First Professional Degree</i>	3012	Registered nurses and registered psychiatric nurses	10,890	1,290	3,250	4,540
	4032	Elementary school and kindergarten teachers	5,140	670	1,580	1,920
	2171	Information systems analysts and consultants	3,130	350	980	1,650
	4011	University professors and lecturers	2,930	460	820	1,280
	2174	Computer programmers and interactive media developers	2,550	640	640	1,280
LEVEL B: <i>Usually requiring diploma, certificate or apprenticeship training</i>	1221	Administrative officers	5,810	540	2,800	3,340
	1241	Administrative assistants	6,120	600	1,890	2,490
	4212	Social and community service workers	4,720	750	1,450	2,190
	6322	Cooks	5,700	840	910	1,750
	7271	Carpenters	6,890	-120	1,700	1,580
LEVEL C: <i>Usually requiring secondary school and/or occupation-specific training</i>	6421	Retail salespersons	15,650	670	3,050	3,730
	3413	Nurse aides, orderlies and patient service associates	6,850	1610	2,020	3,630
	1411	General office support workers	5,150	450	1,450	1,900
	1414	Receptionists	4,720	610	1,160	1,760
	4412	Home support workers, housekeepers and related occupations	3,470	570	1,120	1,690
LEVEL D: <i>Usually requiring on-the-job training</i>	6711	Food counter attendants, kitchen helpers and related support occupations	8,730	1260	780	2,040
	6733	Janitors, caretakers and building superintendents	4,920	390	1,420	1,810
	6731	Light duty cleaners	5,390	510	1,240	1,760
	6611	Cashiers	6,930	360	810	1,170
	8612	Landscaping and grounds maintenance labourers	3,390	160	520	670