

FACULTY OF MANAGEMENT

Terms of Reference of the Review Committee

Purpose of the Review:

To review the strength and balance of the Faculty's teaching and research activities, academic programs, and service; to evaluate the Faculty's leadership and administration; to assess the Faculty's standing nationally and internationally; and to advise on the future development of the Faculty.

Background Material

- The University's goals and objectives as outlined in its [strategic priorities](#) and the Okanagan [ASPIRE](#) process
 - The Faculty of Management Self-Study
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Terms of reference

Without limiting its overall mandate, the Review Panel should consider the following:

1. ***Undergraduate Education and Student Learning:*** To review and evaluate the quality, extent, format, organization, and enrolment of the Faculty's academic programs and teaching strength, and to compare its performance in these areas to that of its national and international peers. The reviewers are asked to give attention to the Faculty's development of curriculum in the face of changing societal expectations, its support of experiential learning opportunities, and its engagement with cross-campus activities. The reviewers should also give some consideration to the success of Faculty of Management's students after completion. Are the program comprising the various degree built for the future?
2. ***Student Academic Experience and Support:*** To assess the quality of the student undergraduate academic experience from first contact upon admission through to alumni status. Are students well advised and well supported? Consider student morale, strength of student retention, co-curricular opportunities, and career preparation. The reviewers are asked to consider the Faculty's responses to the increasingly diverse nature of student populations.
3. ***Graduate Education and Post-Doctoral Training:*** To review and evaluate the quality, extent, format, organization, and enrolment of the Faculty's graduate programs, and compare its performance to that of its national and international peers. The reviewers are asked to give attention to the Faculty's

development of curriculum in the face of changing societal expectations, its support of experiential learning opportunities, and its engagement with cross-campus activities.

4. **Research, Scholarly, and Professional Activity:** To review and evaluate the quality, extent, range, and balance of the research, scholarly and professional activities of the Faculty with particular attention to the achievement and reputation of scholars within the Faculty, including its leadership in research institutes, research facilities, innovation and international partnerships.
5. **Leadership and administration:** To review and evaluate the governance, organizational structure, leadership, planning, and administration of the Faculty, including opportunities for diversity in leadership and shared governance, the nimbleness and inclusiveness of planning, as well as the relevant support systems both within the Faculty and available to the Faculty. The reviewers should consider the degrees to which governance is transparent, flexible, and accessible to all members of the Faculty.
6. **People, environment and culture:** To consider and assess the working and educational environment, morale, and institutional culture of the Faculty, as reflected in the experiences and perceptions of faculty members (including adjunct professors, lecturers, and sessional instructors), staff, and students.
7. **Community Engagement:** To assess the nature, scope, and effectiveness of the Faculty's engagement and outreach activities through its educational and research programs and its interactions with other units within the University, and with its external community including schools, community or professional organizations, Aboriginal groups, government agencies, UBC alumni, and other post-secondary institutions.
8. **Support for the University's and campus Strategic Plans:** To determine the extent to which the Faculty reinforces through its programs and activities the key commitments of UBC and ASPIRE, notably UBC's commitments to International Engagement, Aboriginal Engagement, Intercultural Understanding, Global Citizenship, flexible and experiential learning and interdisciplinary programming and research.
9. **Physical Infrastructure:** To assess the range and quality of the teaching and research facilities at the Faculty's disposal, and to determine whether the Faculty is appropriately housed and equipped to meet its teaching and research goals.
10. **Infrastructure and Resources:** To review and evaluate the physical and financial resources of the Faculty, including its financial base (i.e., levels of university funding, funding by external agencies, tuition revenue, and donor support), its capacity for enrolment management, its plans for revenue diversification, its facilities for teaching and research, and its equipment and space.
11. **Future development:** To identify the challenges and opportunities facing the Faculty, and to make recommendations about possible directions for its future growth and development.

Faculty of Management Review

January 2017

Drafted by the Dean's Office with input from faculty and staff

Final version, 6th January 2017

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Executive Summary

This report highlights key areas within the Faculty of Management and examines how they have evolved. It looks at the Faculty's achievements, challenges and opportunities. With the strategic planning and implementation over the past four years, we have made significant strides towards our goal of being a more inclusive and broader management school engaging students and colleagues across the campus, in our community and across Canada, as well as fostering key international connections. We are now establishing our position as a world-leading, non-metropolitan management school renowned for community engaged research and teaching relevant to internationally connected, rapidly changing and fast developing regions.

Since 2012, key achievements for undergraduate students include modifications and improvements to program delivery, an enhanced focus on experiential learning, and a high international student enrolment. To improve the experience of students we put in place a unique student-advising model, created a student relations working group, and developed a faculty liaison and outreach librarian position.

For graduate students we redeveloped the Master of Management, and run a successful pilot for the program. The creation of interdisciplinary course offerings has also enhanced the variety of their options.

The Faculty's deep commitment to community engagement is evident in a number of our initiatives, including opening the Management Co-op Program to students in other Faculties and disciplines. We have refined the signature Capstone Service Learning and Consulting course, and worked at enhancing co-curricular career events for students and community partners.

Faculty members in Management have led high-profile research projects, often in collaboration with colleagues across campus and further afield. The Faculty has focused on experiential, cross-campus and interdisciplinary research. Faculty research funding rose by 58% over the last four years, with a dedicated coordinator now in place to support further increases.

Internally, we undertook a successful organizational review and restructuring based on clear aims and objectives, and created a faculty director position to support the changes. In all the work we do, we emphasize collaboration in cross-campus activities and initiatives. The Faculty holds regular Faculty Council meetings and retreats to identify and make progress on key concerns, and establishes faculty-student-community working groups to tackle issues as they arise. Additionally, we created a communications and marketing strategist position, to help clarify and disseminate the priorities and achievements of the Faculty.

As evidenced throughout the report, we have supported the strategic plans of the University and the Okanagan campus, for example breaking new ground in co-op and experiential learning, innovating in flexible learning, leading cross-campus inter-disciplinary programming, and developing new research partnerships.

The progress the Faculty of Management has made over the past four years gives a foundation and momentum to build upon, continuing on our strategic path. We benefit from our base in the new Engineering, Management and Education Building; consider it vital to create “clash spaces” to enable faculty, staff, students and community partners to interact; and appreciate that our strategic development will necessitate more offices and new teaching space. As immediate next steps, 5 new faculty are budgeted for recruitment, and we are projecting revenue increases from programming and research. We will also introduce new budget processes, translating long run strategic priorities into everyday operations.

The niche we have created directly responds to demand for reconciliation of the local and global in both metropolitan and non-metropolitan contexts. Restructuring a Faculty is not an immediate process, and our successes to date are just the start of the progress we envision over the next 10 years, including growing to 40 tenure/tenure track faculty members, contributing to the development of an inter-faculty graduate program, and collaborating with international partners to enhance our research and our programs. Given our momentum, we are planning for the future, building on our foundations and working toward realizing our vision.

Introduction

Aimed at impacting socio-economic development of the Okanagan and the British Columbia Interior, UBC's Faculty of Management and its Bachelor of Management program were formally established on July 1st 2005.¹

As detailed later in this report, the Faculty experienced rapid growth, from a student headcount of less than 200 in 2005/06 to well over 700 by 2011/12, and more than 800 by 2015/16.² A single faculty member and no staff in 2005, rose to 14.3 and 5.8 full time equivalent (FTE) faculty and staff by 2011/12, and to 14.0 and 10.8 FTE today.³

Prior to 2012, the Faculty experienced multiple changes in leadership, and alterations to its organizational structure within the university. Between January 2006 and July 2009, it had 3 Deans or Acting Deans. In 2010 the Dean of the Sauder School of Business at UBC's Vancouver campus was appointed Dean of the Faculty of Management for a 3-year term, and in June 2010 a formal alliance was struck between the two Faculties. They became jointly governed. However, in 2010 both the Faculty of Management and the Sauder School of Business asked for independent Deans. An Acting Dean of the Faculty of Management was appointed in January 2012, pending an international search for a new Dean. The current Dean took up post in October 2012.

This report focuses on 2012 to the present, and considers achievements, opportunities and challenges. One of the objectives in appointing the Dean in October 2012 was to bring stability and develop a vision for the Faculty, reflecting the aspirations of the Okanagan campus, and UBC as a whole.

Faculty of Management Vision

We are UBC's Faculty of Management, world-renowned for community engaged research and teaching of management knowledge that empowers diverse people to manage and lead economic and social activity through varied organizations in internationally connected, rapidly changing and fast developing regions - including non-metropolitan regions

¹ 2005/06 was a transition year for the Faculty of Management. Undergraduate students were classified as Bachelor of Arts (B.A.) students until March 1st, 2006.

² See [Section 1](#) and [Section 3](#) on undergraduate and graduate programming, respectively.

³ See further details in Appendix 0.1, the Faculty of Management Composite Report, summarizing faculty and staff numbers, student enrolment, research funding and budget since 2011/12. See also Appendix 7.1 for a complete list of faculty, staff, lecturers, adjuncts, associate members and others that have worked with the Faculty since the current Dean joined in October 2012.

We are a small and rapidly evolving Faculty, and over recent years have built on the strength of our location in the centre of an entrepreneurial, non-metropolitan region.

We have sought to become an inter-disciplinary actor at the core of integrated, cross-campus innovation and socio-economic impact. To that end, we have defined our priorities, including:⁴

1. Transforming the structure of our core undergraduate degree
2. Opening our programming to students across campus
3. Renewing our taught graduate program to emphasize our global engagement from a regional base
4. Enhancing our performance in experiential learning and community engagement
5. Facilitating faculty and staff development
6. Developing teaching and research collaborations across UBC, with communities and with other universities, both in Canada and internationally

The Faculty of Management has identified its niche as an inclusive school that undertakes research and engages students by reconciling the local and the global in both metropolitan and non-metropolitan contexts. This is particularly vital in a globalized world where people are increasingly mobile and demand education that reflects this reality. We have created the right programs to capitalize on our advantages, and we are now building on this foundation by:

- Realizing the opportunities for management research, teaching and community engagement aligned with [Aspire: Envisioning Our Future](#), the strategic planning document for the campus
- Providing opportunities for students to experience the interface between local and global in the live challenges they address as part of their studies
- Creating a distinctive Faculty of Management, at the heart of one of the world's leading universities
- Having the ability to impact the socio-economic development of the Okanagan, the British Columbia Interior and comparable regions around the world

[Section 1](#) examines the undergraduate program and [Section 2](#) the undergraduate academic experience, looking at how students are supported throughout their academic career, morale, student retention, co-curricular opportunities and career preparation. [Section 3](#) considers

⁴ See Appendix 0.2 for a SWOT analysis and Faculty priority areas presented at the UBC Board of Governors, October 2016

graduate programming using the same lens as for undergraduate students, including curriculum, experiential learning, and engagement in cross-campus activities. [Section 4](#) assesses the Faculty's engagement and outreach activities through its educational and research programs, and interactions with internal and external stakeholders. In [Section 5](#) we consider the Faculty's research, scholarly and professional activity, as well as the achievements and reputation of scholars within the Faculty, including leadership in research institutes, research facilities, innovation and international partnerships. [Section 6](#) focuses on the governance, organizational structure, leadership, planning and administration, and transparency of the Faculty. We consider the Faculty's people, environment and culture, focusing on the working and educational environment, morale and institutional culture in [Section 7](#). Throughout the report we evidence how the Faculty of Management has acted on the aims and objectives of *Aspire: Envisioning Our Future*. [Section 8](#) highlights those actions. [Section 9](#) considers the Faculty's infrastructure, pointing to the space concerns that we are beginning to face, and [Section 10](#) turns to our financial base and enrolment targets. Finally, [Section 11](#) identifies challenges and opportunities facing the Faculty, and makes recommendations about future growth and development.

1. Undergraduate Program

Highlights

- Modified program delivery
- Focus on experiential learning
- High international student enrolment

The Bachelor of Management (BMgt) is the cornerstone educational offering of the Faculty. The program has undergone significant change in the last ten years, culminating in the recent modifications to its delivery, detailed later in this Section. Further development is planned.

The objective of the program is to provide a transformative learning experience focusing on:

- Experiential learning
- Interdisciplinary education
- Application of management approaches to research and analysis

The program aims to develop:

- Theoretical and practical understanding of management in a variety of fast-changing organizations
- Critical thinking and resilience in the face of our rapidly evolving world
- Respectful leadership approaches
- Inter-cultural awareness to embrace diversity (not only as a characteristic of organizations in practice but also as a determinant of effective managing and leading)

The Faculty of Management experienced enrolment growth for eight consecutive years between 2005/06 and 2012/13. From 2013/14 to 2016/17, enrolment remained steady with a headcount of 843 students. Overall undergraduate headcount by student origin (domestic and international) is diagrammed in Figure 1.1.

Domestic students account for 71% of the total undergraduate student population. Domestic undergraduate student enrolment increased by 436 students between 2006/07 and 2011/12. Over the last five years (2012/13 – 2016/17), domestic student enrolment decreased by 9%.

The Faculty of Management comprises 245 undergraduate international students, accounting for 29% of our total undergraduate student population for 2016/17. International student

enrolment has increased significantly in the last decade - by almost 230 students since 2006/07. International student enrolment has increased by 46% since 2012/13.

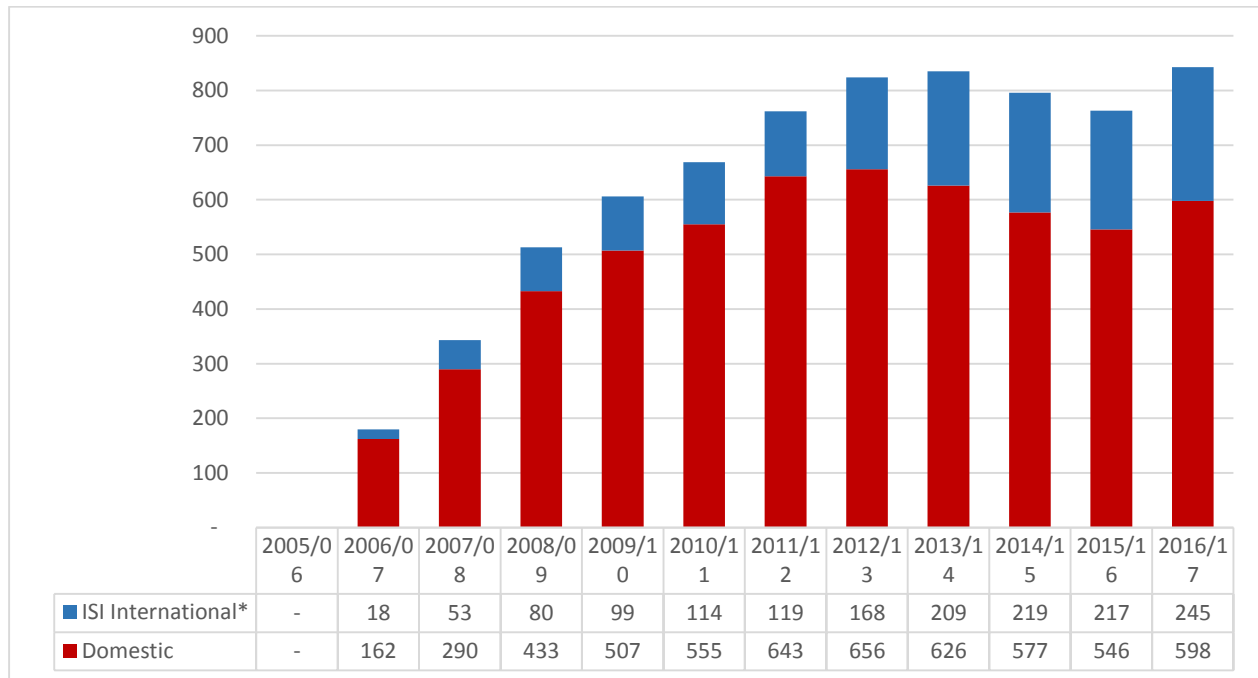


Figure 1.1: Undergraduate student headcount, winter session. Data valid as of November 1 of each year

**ISI (International Student Initiative) students are typically degree seeking or unclassified and are charged an international rate. ISI International refers to tuition rate class (re: exclusion from Ministry funded FTE).*

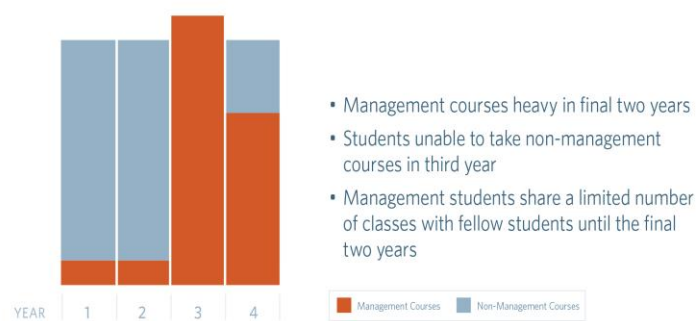
Achievements

Modified program delivery

Since its introduction in 2005, the Bachelor of Management program was organized according to the 2+2 structure. In the first two years, students enrolled in a broad selection of elective courses in arts and sciences as well as in management. The third year of the program included compulsory courses in business conditions analysis, financial accounting, information technology management, managerial accounting, management communications, marketing and organizational behaviour. The fourth year allowed students to narrow their selection of courses according to their choice of specialization. The program concluded with a final capstone course that provided students with hands-on learning experience to address a problem facing partner organizations.

The program has now been modified to a four-year model to be implemented in the 2017-2018 Winter Term - see Figure 1.2. The rationale is to increase students' exposure to management courses earlier in their academic careers, providing them with greater inclusion in the Faculty and deeper understanding of the subject matter.⁵ Before the Faculty proceeded with the changes, stakeholders were engaged in a thorough consultation process to discuss the proposed modifications to the program and the potential impact on students. In total, 87% of current students, alumni and community partners who responded to surveys agreed with the proposed change.⁶ Senate approved the proposal in the spring of 2016. The Faculty of Management is planning for revised delivery of the program to incoming first-year students, and is making considerations for transfer students starting in September 2017.

CURRENT 2+2 PROGRAM STRUCTURE



PROPOSED 4-YEAR PROGRAM STRUCTURE

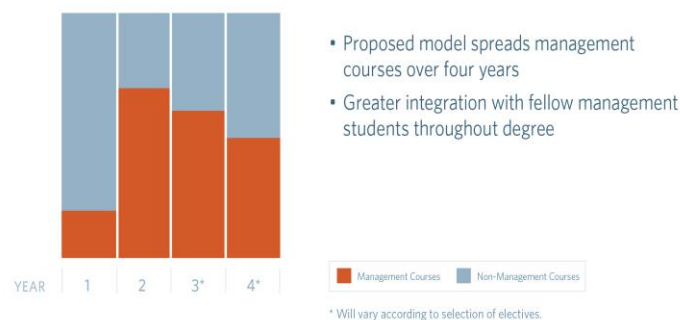


Figure 1.2:

The contrasting spread of courses in the 2+2 versus four-year Bachelor of Management program

⁵ See Appendix 1.1, "Executive Summary of the Senate Proposal re: 4-Year BMgt. Program Revisions", March 2016

⁶ See Appendix 1.2, "What We Heard – Consultation Report", April 2016

Experiential learning - UBC Okanagan Co-op Education program

The Faculty has recently opened its co-op program to all Okanagan campus students. The 2016-2017 intake for the UBC Okanagan Co-op Education program has shown a significant increase in applications from a wide range of study areas. For a detailed description of experiential learning see [Section 4](#).

International student enrolment

The significant growth in numbers of international students has contributed to the diversity and richness of the undergraduate program. We have the second largest International Student Initiative enrolment on the Okanagan campus (behind only the Irving K Barber School of Arts and Sciences (IKBSAS) in absolute numbers). We exceeded targets from 2012-2014, and experienced 82% enrolment growth between 2011-2015.⁷ We anticipate demand will continue, with increased enrolments in our undergraduate program, and also into our second year through Vantage College, which provides an access program combining one year of academic degree-focused credits with intensive academic English preparation.

Challenges

As we move into the next phase of the Faculty's development, we face some challenges. As a new organization operating in a non-metropolitan region, UBC's Okanagan campus has struggled with recruitment and retention of faculty. We are working with external recruitment consultants searching for talent in international markets. We are also working with colleagues across UBC to build our capacity by appointing existing faculty members as associate members of the Faculty of Management, for example to provide insight and guidance on undergraduate curriculum development (Jan Cioe, based in psychology in the Irving K Barber School of Arts and Sciences, IKBSAS).

Enriching the undergraduate program with experiential learning opportunities can also require significant energy and commitment, as mobilizing partners in the geographically dispersed Okanagan, and in the Interior more widely, involves commitment of sparse Faculty resources. This is mirrored on a global setting, as the Faculty mobilizes cross-border relationships to develop international opportunities for students.

⁷ See Appendix 1.3, "Faculty of Management Student Profile", May 2016

Management is also leveraging cross-disciplinary teaching opportunities to expand curricula and programs. However, developing relationships across other Faculties in UBC requires a significant investment of time and resources.

Communicating the distinctiveness of the Okanagan campus, and of the Faculty of Management to prospective students in Canada and abroad is also a challenge. The Faculty has invested in a new staff role focused on communications and marketing for undergraduate recruitment and programming. The communications and marketing strategist is tasked with conducting surveys and focus groups, and supporting student relations initiatives to achieve greater inclusion in the Faculty and gain greater understanding of the student experience. The new position works closely with UBC's university relations to leverage central resources, build best practice in support of broad campus initiatives, evolve and enhance processes, and foster greater institutional knowledge of students in support of strategic decision making. This development is another opportunity to build relationships across campus.

As we grow, a larger student body challenges our intimate learning environment and requires purposive strategies to foster cohesiveness. The Faculty of Management needs to embrace inclusive policies to ensure international student integration in our activities, especially bearing in mind that whilst our international enrolment met or exceeded targets between 2011 and 2015, growing by 82%, international student retention was in decline. In 2014, the Bachelor of Management recorded the largest decline in retention on campus, with international student retention falling by 5.4%. Besides rising to the challenge of ensuring greater cultural appreciation and understanding, we must also be mindful of other student retention services on the Okanagan campus, such as affordable housing support.

Opportunities

The Faculty is refining its processes to prepare for significant undergraduate growth. The delivery of the Bachelor of Management as a four-year program opens opportunities to assess and renew curriculum content in line with the Faculty's vision, and to develop minors in Management, to be offered to students in multiple disciplines across the Okanagan campus. This initiative has been well received by campus colleagues in other Faculties and by student admissions, which sees strong demand for options in minors.

In addition to new experiential learning opportunities, the Faculty is furthering initiatives for international exchange. We support GoGlobal for Management students, and are developing further partnerships to increase international experience offerings for students. For example, in

April 2016 the Faculty of Economics and Business at the University of Barcelona and the UBC Faculty of Management signed a student mobility agreement.

We are also supporting expanded international student enrolment with academic resources, enhancing our efforts to include international students in campus life. We are in the process of hiring a liaison and outreach librarian. The new librarian will enrich the student experience by interacting with all our students, and by helping faculty and staff to respond to student needs and expectations. The new hire will be in place early in 2017.

2. Undergraduate Student Academic Experience

Highlights

- Domestic student retention rate higher than campus average
- Unique student-advising model
- Creation of a student relations working group
- Introduction of a faculty liaison and outreach librarian position

Over the past few years, the Faculty of Management has been investing resources to better understand, develop and evaluate the quality of the undergraduate experience. Various key issues have emerged:

1. Student retention and morale
2. Student clubs and organizations
3. Opportunities for co-curricular activities and career preparation
4. Approach to student advising
5. International student retention, and diversity.

Student retention and morale

Like most Faculties across campus, the Faculty of Management has been monitoring student retention as an indicator of student performance and program fit. Figure 2.1 demonstrates that domestic student retention is strong – with overall retention rates of 87-89% between 2012 and 2014. Female students are leading this trend, peaking at 91% in the 2014/2015 cohort. This outpaces student retention figures for the Okanagan campus, which had retention rates of 84-85% in the same three-year period.

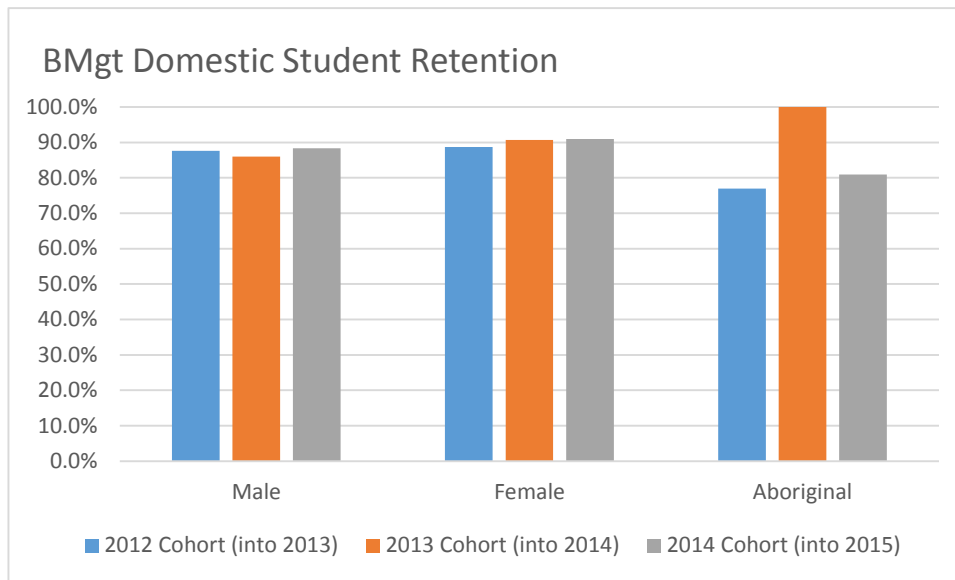


Figure 2.1: Bachelor of Management domestic student retention, 2012-2014

Another student experience indicator that we use is alumni surveys. The 2014 Survey of 2012 Baccalaureate graduates found that 84% of alumni were satisfied with the undergraduate program and the quality of instruction. Alumni reported that they acquired group collaboration and independent study skills. 70% would select the same program again. At the time of the survey, 50% of graduates surveyed were located in the Southern Interior – reinforcing the Faculty’s goal of improving the socioeconomic position of the region as per objectives under *Aspire: Envisioning Our Future*, the campus strategic planning document.

As enrolment numbers increased and the Faculty experienced challenges with available faculty members, proposed changes to the accounting program in 2014 (which did not go ahead) resulted in a strong response from the student body. We observed a disconnect between faculty and students, emphasizing the need for greater consultation and engagement. As a result, the Faculty committed to strengthening relationships with the Management Student Association, student clubs and organizations, and the general student body, building on existing relations by forming an accounting working group and a competitions working group (see [Section 7](#)). The Faculty has initiated focus groups for ongoing dialogue with students, and in September 2016 a student relations working group was struck, to identify and foster opportunities for faculty, staff and students to work together for mutual success. There is healthy dialogue and discussion at each working group session, and relationships among all groups are flourishing with a free-flow of information and mutual commitment to enhancing the student experience. We expect that this interaction will nurture collaboration on shared goals, and help student morale and success.

Student Clubs and Organizations

In addition to an array of activities across campus, the Faculty of Management's student experience is strongly related both to the Management Student Association (MSA) and various clubs and organizations, including for the JDC-West competition.

The student-run, non-profit MSA organizes activities and networking events, and supports peer attendance at conferences and competitions throughout the country. It is funded by levies from Bachelor of Management students, and from sponsorships and partnerships. As the MSA is a member of the Canadian Association of Business Students, the students are part of a nation-wide network providing academic and professional development opportunities.

JDC-West is a three-day business competition bringing together 12 western Canadian business schools, competing in academic, debate, sport, and social areas. As the competition provides a robust experience for students, the Faculty of Management offers dedicated instructional support to prepare student teams, investing time, funding and human resources, a challenge for a Faculty of our size. In the 2016/17 academic year we tasked two sessional lecturers as faculty competition co-leads to support student training and preparation for JDC West. Work is underway to develop an innovative case workshop so more students might participate productively in competitions.

Co-Curricular and Career Preparation

The Faculty of Management has taken a key role in running a variety of career development activities both on and off campus. For the past four years we have identified two key events, with the goal of engaging students in skill development workshops and networking activities with community partners: Career Days, and Discovery Career Conference.

Career Days, held the first week of November each year, is the largest on-campus student-networking event. Other activities throughout the Career Days week include organization of information sessions, interview preparation workshops, and rapid résumé reviews, where local community experts review students' résumés, providing feedback and advice.

The Discovery Career Conference, hosted in February each year, is a breakout-style evening conference with panels of local professionals sharing career stories and industry information with a networking component.

Approach to Student Advising

The Faculty has developed a unique student-advising model to ensure support for Management students. Our undergraduate program coordinator ensures that the student experience is managed from orientation, through students' course planning and academic progression. The coordinator explores ways to work with Academic Advising, the centralised support at UBC's Okanagan campus, to enable seamless advising efforts, which needs particular attention as the Faculty transitions to four-year delivery of our undergraduate program, and plans for potential Management minors for the campus. The coordinator also works closely with other student support roles, including the co-op career coordinator, and experiential learning coordinator.

International Student Retention, and Diversity

Our international student retention is lower than that of domestic students, as indicated in Figures 2.1 and 2.2.

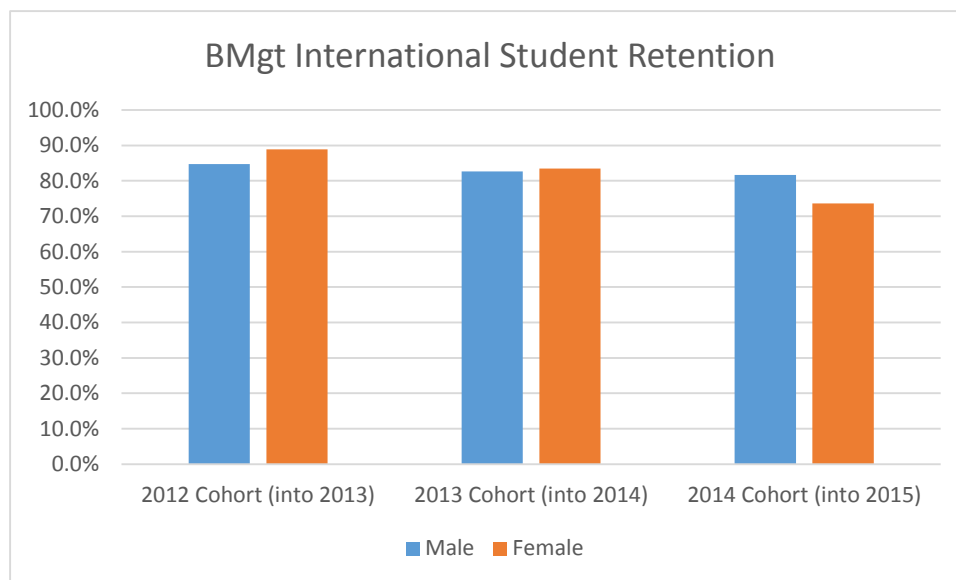


Figure 2.2: Bachelor of Management international student retention, 2012-2014

This phenomenon is not unique to the Faculty of Management; across the campus retention of international students has declined in the last few years. Nevertheless, a retention rate of 77% indicates that international students require additional focus within our Faculty.

Given international students make up 28% of enrolment, their success is critical to achieving not only enrolment projections but also meaningful diversity, which is a cornerstone of success in a

globalized world for both domestic and international students. A faculty liaison and outreach librarian position, created in 2016, will support greater understanding of diversity needs and issues within the Faculty of Management by enhancing the student experience through active engagement across the student body, promoting inclusion, participation and inter-cultural understanding.

This unique role will also better serve Faculty efforts to integrate Vantage College students who make a transition from the Vancouver campus to the Okanagan. UBC's Vantage College offers an innovative, integrated access program for first-year international students combining academic coursework with intensive English language preparation. Vantage is based on the Vancouver campus, where the students spend most of their first year.

Having an in-depth understanding of the international student experience will allow the Faculty to support retention and student success.

3. Graduate Programming

- Highlights**
- Redevelopment of the Master of Management
 - Pilot project for the Master of Management
 - Success of interdisciplinary course delivery

The Faculty of Management’s graduate programming has two facets: the Master of Management (MM), a course-taught graduate degree for professionals administered by the Faculty, and the Interdisciplinary Graduate Studies Master and PhD programs, research-based degrees administered by the College of Graduate Studies and in which the Faculty of Management participates.

The Faculty of Management began accepting graduate students in 2011/12 with a total headcount of 22 students. This included the number of students enrolled in the Interdisciplinary Graduate Studies Master of Arts (MA), Master of Science (MSc), and PhD programs, as well as the professional Master of Management program. Figure 3.1 shows Faculty of Management graduate student headcount by degree type between 2011/12 and 2016/17. The first Master of Management class comprised 19 students. Enrolment for the MM program decreased to ten students by 2012/13, accounting for a decrease in total graduate student enrolment by 55%. Interdisciplinary Graduate Studies MA student enrolment has remained consistent over the past five years. Currently, there are two students enrolled in the MA and eight students enrolled in the PhD program.

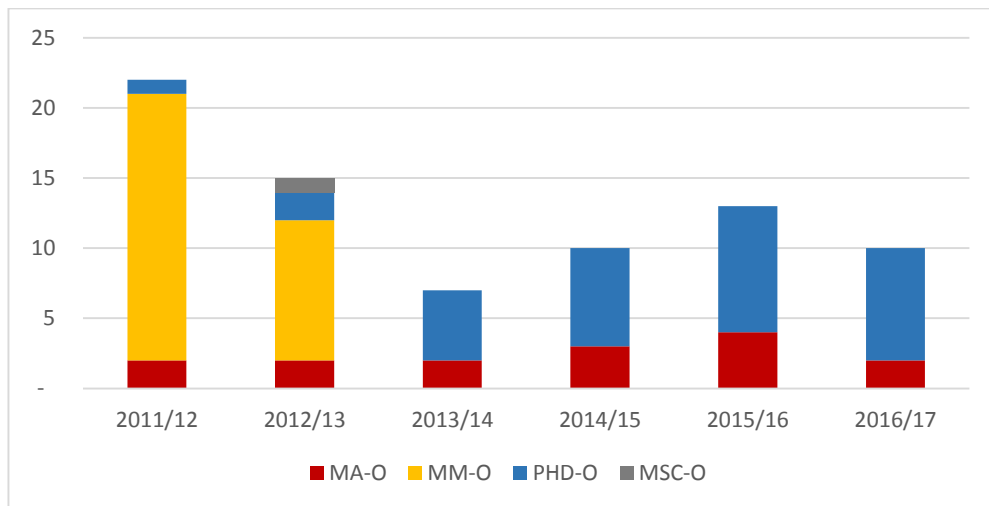


Figure 3.1: Graduate student headcount, winter session. Data valid as of November 1 of each year

For graduate students, one FTE represents the equivalent of a student enrolled throughout the entire school year (May – April). Typically the March 1st FTE count will be higher than the November 1st count. Overall, few graduate students leave their studies after one semester, and many programs begin in January. Figure 3.2 provides a breakdown of annualized graduate student FTE between 2011/12 and 2016/17. Overall, there was a 30% decrease in FTE for management students at the graduate level. This decrease in enrolment levels can be accounted for by the hold on the MM program.

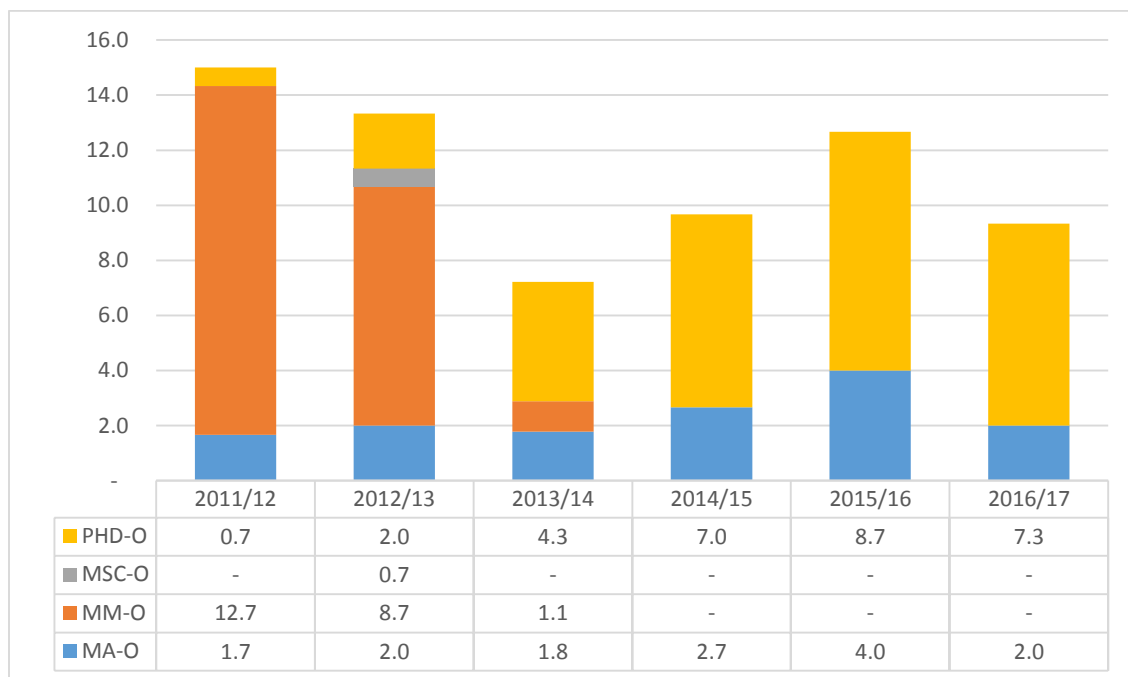


Figure 3.2: Graduate student annualized FTE. Data valid as of March 1 of each year.

Achievements

Master of Management

The decline in enrolment in the Master of Management program by the 2012/13 academic year was due to its formulation as a condensed version of the former Bachelor of Management for recent graduates, and its lack of focus on real-world and area-relevant issues. In February 2013, the Okanagan Senate approved a request to suspend the program to allow for its review and revision. Redevelopment of the Master of Management transformed the program from a nine-month, full-time degree for recent undergraduates from non-management disciplines, to a 25-month, part-time, blended-learning program for professionals working in or with non-

metropolitan regions. As far as we are aware, there is no other program just like the Master of Management in other universities in BC, across Canada or around the world.

Revisions to the Master of Management were a response to a number of needs, such as accessibility for fully employed prospective students. The MM allows fully employed professionals to continue living and working in their current location while they learn online, coming together once a year for face-to-face, intensive learning during two weeks each July for three consecutive summers (see Figure 3.3). Furthermore, the MM was reframed to address the need for graduate-level education to broaden perspectives, and provide participants with transferable capabilities and opportunities in organizations and regions in a globalized world. Transformative learning, as defined in *Aspire: Envisioning Our Future*, was a key consideration throughout program redevelopment, driven by interdisciplinary, community-based experiential learning, and collaboration (peer learning, team-teaching and working with other UBC Faculties as well as international universities). As with the Bachelor of Management program, outcomes for MM graduates include a theoretical and practical understanding of management, the ability to address a rapidly changing world through diverse and inter-cultural perspectives on leadership, citizenship, ethics, communication and research, as well as independent, critical thinking. The redeveloped MM was approved by the Okanagan Senate in 2014.⁸

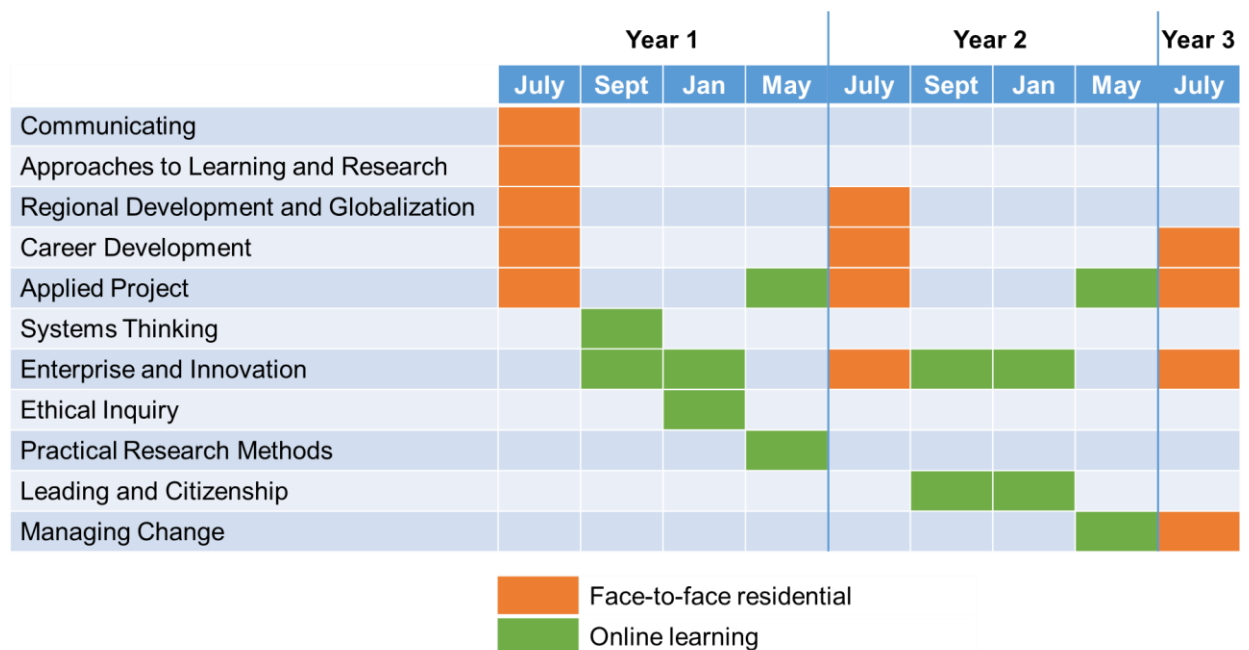


Figure 3.3: Master of Management program delivery

⁸ Appendix 3.1, “Master of Management Proposal to the Okanagan Senate”, April 2014

In September and October 2016, a condensed version of the Master of Management (MM pilot) was offered to program applicants and prospective students in a problem-solving collaboration with community partners at the City of Penticton and Regional District of the Okanagan-Similkameen. Asking ‘Can Cities Join the Sharing Economy?’ the pilot looked at the complex problem of regional sharing of recreational services, and represented an effort to find new ways to manage and lead organizations in non-metropolitan regions. The experience was designed to engage with participants online, followed by intensive face-to-face, community-based, experiential learning over the course of a weekend with representatives from the City of Penticton and surrounding regions in the South Okanagan. After the weekend, participants engaged online in consultation and conversation about future engagements with the city. The entire process aimed to provide a sample of the MM program, and was enthusiastically received by both the participants and the community partners.

Interdisciplinary Graduate Studies

Interdisciplinary Graduate Studies (IGS) offers research-based programs that are administered by the College of Graduate Studies at UBC’s Okanagan campus. The programs provide students with the opportunity to pursue graduate studies across disciplinary boundaries, allowing for both inter-faculty and intercampus arrangements for supervision and courses. The Faculty of Management provides research methods courses. The College is undertaking a major review of the programs, in which the Faculty of Management’s Associate Dean for Regional Innovation Practice has been participating.

In May 2015, the Faculty of Management played a lead role in contributing to an innovative team-taught Interdisciplinary Graduate Studies course, *IGS 520J-003 Community Field Seminar in Socio-Technical Futures Focus: Our Future With Water*. The course was developed in discussion with Imperial College London, and included instructors from the Faculty of Management, the Irving K Barber School of Arts and Sciences, the Faculty of Creative and Critical Studies, and the School of Engineering, as well as a number of community experts from Peachland, a municipality in central Okanagan. Students engaged with a real world problem faced by the partner community around sustainable water supply. The course was delivered in an intensive, two-week residence. IGS students were provided the opportunity to learn from faculty and students from different disciplines, and were able to contribute to a real-world problem faced by the Peachland community. This not only served the needs of the IGS program but also provided another opportunity to pilot the Master of Management, putting into practice

intensive face-to-face learning, interdisciplinary team teaching, and community-based experiential learning.⁹

Challenges

Master of Management

The Master of Management does not follow the format of other programs on either the Okanagan or the Vancouver campus, and therefore many UBC-internal supports do not apply directly to the MM. This includes tasks such as recruiting graduate students, recruiting instructors from other faculties, promoting and marketing the program, offering admission, collecting tuition deposits and establishing scholarships. As these challenges arise, efforts are made to work within the UBC system to find a solution and, failing that, to pursue independent solutions while recording process and sharing outcomes.

The recruitment of domestic and international graduate students to professional course-taught programs is relatively new to UBC. Determining best practices for recruiting and retaining students from outside academia for a newly redeveloped program, and with a small Faculty, is a significant challenge.¹⁰

Interdisciplinary Graduate Studies

Ongoing involvement with the Interdisciplinary Graduate Studies program is particularly important to the Faculty of Management. A strong graduate program is essential to a thriving research environment, and the current size of the Faculty limits our ability to offer an independent quality program. The precise direction of Interdisciplinary Graduate Studies is the focus of the College of Graduate Studies, whose role is to drive development of the program.

⁹ See also Appendices 3.2 and 3.3 “Interdisciplinary Graduate Studies Course – Video”, May 2015, and a summary document drafted for the Deputy Vice-Chancellor and Principal and Vice President, Research offices. “Community Field Seminar Summary”, May 2015.

¹⁰ See Appendix 3.4, “International Student Recruitment at UBC”, July 2015, a report that explores the current methods employed for international student recruitment at UBC for both undergraduate and graduate degree programs, with a particular eye on graduate recruitment challenges for the Faculty of Management, and makes suggestions for consideration.

Opportunities

Master of Management

The ethos of the Master of Management involves diversity and collaboration. Recruitment efforts have been promising, with applications and interviews indicating that the program appeals to non-traditional students, including First Nations students, mature students, students from diverse locations, as well as those who often travel for their work. Gathering a diverse group of MM prospects for the pilot demonstrated that non-traditional students succeed in this environment, and contribute valuable insight and discussion. The program would be served by a transition to a more holistic admissions policy in which consideration is given to the applicant's experiences, leadership, teamwork and interpersonal skills.

A dynamic and innovative online learning environment is instrumental to the success of the Master of Management. Blackboard-Connect is best suited for brick-and-mortar program delivery and is not flexible for online delivery that engages with students and instructors in a collaborative, dialogical and dynamic online environment. Through the MM, a novel learning management system will be piloted with results shared with the greater UBC community. Online delivery will also allow for increased enrolment of UBC graduate students without the physical and institutional restraints associated with brick-and-mortar program delivery.

Given the current size of the Faculty of Management, faculty must be recruited from UBC and partner institutions to deliver the program. This will increase interdisciplinarity and provide an opportunity for collaborative team-teaching in both online and face-to-face formats.

Collaboration with faculty from international partner institutions will also serve to solidify the linkage between the campus and our international partners. These partnerships will provide further opportunity to refine the changing academic environment at UBC's Okanagan campus.

Collaboration with community partners was a key component of the MM pilot, providing an opportunity to bring experienced and diverse students together to solve a real-life challenge. Feedback indicated that community partnerships are instrumental to the Master of Management, benefitting not only communities in the Okanagan, but also other communities in the British Columbia Interior, and in similar regions globally. Building community partnerships and listening to their needs will support the MM's strengths. Moreover, establishing community partnerships will provide an opportunity to recruit prospective students.

The MM pilot was an opportunity for experiential marketing. Prospective students experienced the MM over a short period, not unlike the "Experience UBC" initiative that the Okanagan

campus organizes for prospective undergraduate students. Continued recruitment efforts could benefit from MM initiatives mirroring the pilot.

Interdisciplinary Graduate Studies

There is an opportunity for the Faculty of Management to foster new and existing linkages across UBC Faculties and disciplines, and offer an option to graduate students doing research in management. Moreover, through continued development of the Interdisciplinary Graduate Studies program, there will be opportunities to re-evaluate graduate student admissions and supervision arrangements to provide a clear path to success for future graduate students. We recognize that a robust research-focused graduate program is essential for achieving the research excellence to which the Faculty aspires.

4. Community Engagement

Highlights

- Opening the Management co-op program to students in other Faculties and disciplines
- Refining the signature Capstone Service Learning and Consulting course
- Enhancing co-curricular career events for students and community partners

Over the past five years the Faculty of Management has prioritized community-engaged experiential learning through:

1. Full integration in curriculum
2. Partial integration in curriculum
3. Co-curricular activity

The Faculty has been developing and addressing these three categories of experiential learning, while focusing on advances that support economic, social and cultural well-being with regional and global impact, in line with the strategic plan laid out by *Aspire: Envisioning Our Future*. This resulted in a review of current and best practices for delivering experiential learning opportunities to students at UBC's Okanagan campus, described in a report:¹¹

- Proposing community-engaged experiential learning as a preferred model for the campus
- Reviewing existing approaches and resources available on campus
- Identifying a near- and long-term pathway to implementation of best practices for experiential learning on campus

Achievements

Full integration in curriculum

Experiential learning is at the heart of the Faculty's programming. Our Capstone Service Learning and Consulting (MGMT 490) course partners a regionally based organization with

¹¹ For the full report, see Appendix 4.1, "UBC Okanagan Campus - Experiential Learning Report", March 2015.

undergraduate students and provides consulting support to an operational challenge. The organization receives over 50 hours of dedicated student attention, including research and recommendations in a written report and group presentation. This signature course went through significant changes in 2014, resulting in a defined application and selection process for community partners, and setting expectations for both students and partners. The course is now team taught by industry experts and supports around 50 projects per year, expanding annually to include diverse organizations across the Okanagan and the British Columbia Interior. Community partners benefit from the student presentations, detailed research and recommendations. This innovative approach to experiential learning at the undergraduate level has provided the Faculty with the opportunity to build meaningful partnerships within our communities. This philosophy is embraced across campus, resulting in successful inter-faculty groups such as Management students working with both Engineering and Nursing students. The structure of the course is designed to respond effectively and innovatively to the increasing complexity of an organization’s operational challenges.

Another signature experiential learning activity is our Live Case Challenge, a mandatory case competition for third-year students. In 2014 we received a five-year gift of \$75,000 from Argus Properties to support this program. Live Case Challenge provides an opportunity to engage a regional community partner by building a case study focusing on a real-life challenge. Students address the challenge and present solutions in a round-robin competition over an intensive few days. Live Case Challenge finishes with presentations by the three finalists and an award celebration. The presentations are open to participation by the community, and mark the culmination of our academic teaching term each spring. With an ever-growing network across sectors throughout the region, the Faculty of Management has embraced the Okanagan as a “living lab” for experiential learning.

Regional community partners in the Live Case Challenge have included:

2016/17 (upcoming)	SunRype - A Canadian beverage and snack company based in Kelowna since 1946
2015/16	City of Kelowna - Represented by the Planning, Transportation and Infrastructure departments of the municipality
2014/15	Totalamber - Provides support and consultancy services on ERP systems to organizations globally
2013/14	South Okanagan-Similkameen Healthy Living Coalition - Coalition of organizations with a shared goal of reducing the burden of preventable chronic disease throughout the South Okanagan Similkameen region
2012/13	HuStream (Accelerate Okanagan) - A video production company

Consider also the Healthy Living term project, created in 2014 as part of Introduction to

Marketing (MGMT 320), a mandatory course in the Bachelor of Management program. Over the last three years groups of students have worked with a designated community partner, including local governments, coalitions, non-profit and for-profit organizations, to develop health promotion plans addressing challenges in the following regional development concerns:

- Age-friendly infrastructure
- Social support networks
- Education and health literacy recruitment and retention
- Social environments
- Food safety and security
- Personal health practices and coping skills
- Healthy child development
- Access to health services
- Arts and culture

The purpose of this community-based experiential learning project is to expose students to regional development concerns and the role of marketing. There is an increasing need for healthier communities, not only to shift the growing costs of health care service delivery but also to ensure health and wellness for the next generation. Promotion and awareness campaigns help address these challenges.

The Healthy Living project is structured to engage community partners in experiential learning, to employ action research approaches to examine the decision-making and health prioritization processes among organizations and communities in Interior British Columbia, and to extend knowledge-translation activities by engaging a diverse group of stakeholders in community-based experiential learning activity.

Partial integration in curriculum

In 2015 the Faculty of Management achieved the Canadian Association for Co-operative Education (CAFCE) National Accreditation for the Management Co-operative Education Program. The Management Co-op Program was commended for excellent practices, including the process for student selection, work term preparation, and UBC Student Safety Abroad

Policy.¹² National Accreditation indicates the highest quality program delivery and execution, and helps to engage new partners, critical for a new campus, and new Faculty.¹³

The Faculty of Management recently opened its successful Management Co-op Program to Okanagan campus students outside the Management subject area. Through a joint-faculty agreement spearheaded by the Faculty of Management and Provost's Office, eligibility for the new UBC Okanagan Co-op Education Program was articulated and approved by Senate at the end of the 2015-16 academic year.¹⁴

Intake for the first inter-faculty cohort in 2016-17 showed diverse applications from a wide range of subject areas: biochemistry, chemistry, computer science, earth sciences, economics, English, fine arts, human kinetics, history, management, math, philosophy, psychology, Spanish and zoology. Community partners benefit from engaging with multiple Faculties at a single point (rather than at multiple co-op offices), and accessing a diverse pool of pre-screened candidates ready to support their organization's projects.

As a result of establishing the UBC Okanagan Co-op Education Program, and opening experiential learning opportunities for the majority of undergraduate programs on UBC's Okanagan campus, the [Southern Interior Development Initiative Trust](#) (SIDIT) recently provided a pilot grant of \$50,000 per year over the next three years.¹⁵ This grant will deliver wage subsidy for organizations that identify the co-op employment opportunities supporting the SIDIT mandate, "to help grow and diversify the economy of the Southern Interior of British Columbia through economic development initiatives." This new pilot grant will ensure even more accessibility for regional community partners to interact with UBC's Okanagan campus, while exposing students to new communities.

Co-Curricular

The Faculty of Management has supported the engagement of community partners with students through a variety of career development and recruitment activities, both on and off campus. This entails interaction with partners across various productive sectors, detailed in Figure 4.1.

¹² See Appendix 4.2, "CAFCE Accreditation Review Committee Letter of Recommendation", January 2015.

¹³ See Appendix 4.3, "CAFCE Accreditation Letter of Approval", May 2015.

¹⁴ See Appendix 4.4 for the rationale used when gaining approval across campus for the new UBC Okanagan Co-op Education program, "Proposed Inter-Faculty Co-op Program", September 2015.

¹⁵ See Appendix 4.5, "SIDIT Grant Agreement", August 2016.

Co-curricular Career Development Activities –partner representation broken into Industry sector

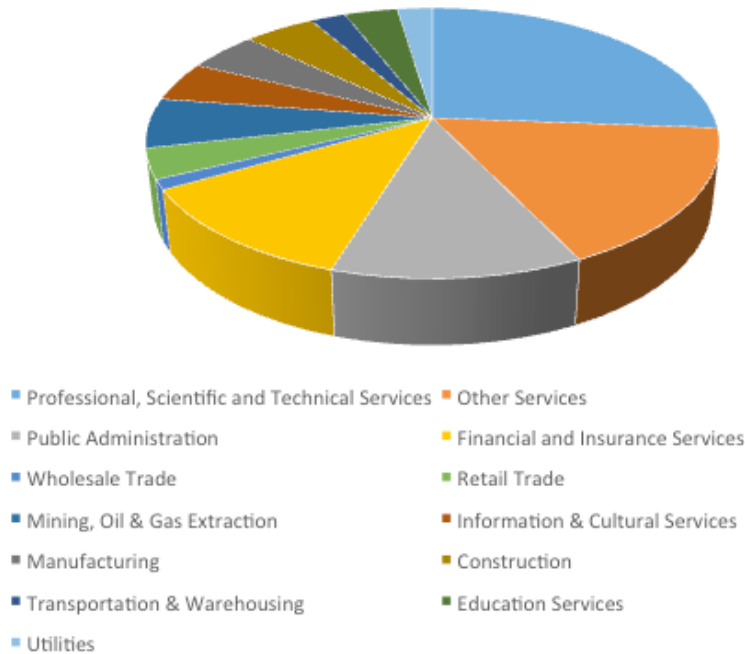


Figure 4.1: Co-curricular career development activities, by industry sector, 2012-2016

Note: Cumulative data, from engagement with speed networking, and Discovery Career Conference

The Faculty identified two key co-curricular career development activities - Career Days, and Discovery Career Conference (see [Section 2](#)). Each provides community partners with the opportunity to raise their profile on campus, allowing them to identify possible new recruits, and contribute through mentorship and facilitated engagement.

The activities also provide the Faculty with an opportunity to partner with departments across UBC. In 2016 the speed networking and social activity undertaken as part of Career Days was co-sponsored by UBC Alumni, enabling the department to execute their mandate of supporting current and recent graduates through career development and networking. Feedback from participating community partners and students has been positive.

The Faculty also hosts the Chartered Professional Accountants (CPA) Fall Recruit in September. This consists of both on- and off-campus networking activities with local and western Canadian public practice firms recruiting to fill new graduate, summer and co-op employment opportunities. In 2015 the Faculty of Management collaborated with the School of Business at Okanagan College and CPA to host Fall Recruit, which was previously hosted separately.

Collaborating on this event reduces redundancy, making it more effective for the public practice accounting firms to participate, and engages all students interested in the field of accounting within the region. As demand for the positions exceeds availability, the Faculty runs workshops to support students in preparing for the job application process, providing one-to-one career coaching, and hosts space for interviews on campus. The Faculty works to maintain strong relationships with the CPA, Okanagan College and community partners.

Throughout the year the Faculty facilitates and hosts organizations interested in conducting company information sessions, posting job opportunities for students, and holding on-campus interviews. Providing support to community partners through such co-curricular activities has helped develop relationships with local and national organizations, and increase student awareness of opportunities after graduation. Many graduates have successfully obtained career positions within these organizations.

Challenges

Engaged relationship building requires investment of both time and resources. As a Faculty concerned with socio-economic impact on communities within our region and internationally, we continue to embrace the opportunity to work with all types of organizations - including non-profit, First Nations, community-based coalitions, and for-profit. Dealing with unique and complex management and operational structures requires that we increase our ability to work collaboratively across Faculties at UBC's Okanagan campus, and with international partners, drawing on the diversity of expertise and knowledge. As a regionally-based campus, we must also avoid saturation of partners, which could cause fatigue. Our effective internal oversight of the engagement with community partners is critical - in terms of both activities within the Faculty of Management, and coordination between the Faculty and elsewhere in the UBC system. As we consider both undergraduate and graduate programming, and the opportunity for community engagement, we will need to link classroom activities coherently and robustly to the needs of our community partners, to achieve meaningful impact.

When people engage with UBC and with the Faculty of Management, they do not recognize a difference between interactions with a faculty member, program lead, staff member or even a student. Consequently, this requires even greater diligence and effective communication to ensure message consistency, and meaningful engagement.

Opportunities

As we plan for the further development of the Faculty, we see community-engaged experiential learning as a focal point. We are increasing the number of industry experts leading the fourth year Capstone Service Learning and Consulting projects to include communities across the Southern Interior. We are also building synergy across various experiential learning activities; for example, a structure enabling us to identify a capstone project leading to a co-op opportunity. Our focus on alumni engagement will help build such a structure, and identify new community partners for experiential learning. We are working with alumni to open opportunities for students within the organizations where they work. This allows the organizations to benefit from the students' work, the students gain valuable experience, and the UBC-alumni relationship is deepened.

The Faculty's graduate programs offer further opportunities to develop new partnerships. Collaboration with community is a key component of those programs, particularly the Master of Management (see [Section 3](#)). As professionals enrol in the MM, there will be further opportunity for the Faculty to build connections with their organizations and communities. This will not only benefit communities in the Okanagan, throughout the British Columbia Interior and in other regions globally, but it will also increase opportunities for our students to gain local and international experience in line with the recommendations of *Aspire: Envisioning Our Future*.

5. Research

Highlights

- High-profile research projects led by Faculty of Management faculty
- Faculty research funding increased by 58% over the last four years
- Focus on experiential, cross-campus and interdisciplinary research
- A dedicated coordinator position to support research funding

The Faculty of Management sits at the nexus of the three main themes emerging in *Aspire: Envisioning Our Future*, the strategic planning document for UBC's Okanagan campus. We embody both experiential and collaborative research, and we seek regional and global impact. With its strong focus on interdisciplinarity, the Faculty has also taken a leadership role in pursuing research opportunities across campus. For example, the Regional Socio-Economic Development Institute of Canada (RSEDIC) was initiated and led by colleagues in Management. With a focus on healthy regional economies, RSEDIC was created in 2015 to connect with communities, both locally and internationally (see also [Section 6](#)).

The Faculty of Management has 8.3 tenure-stream FTE faculty members with active research programs. Researchers have diverse and wide-ranging interests and outputs. We have research strengths in entrepreneurship (e.g. Chiasson, Marcolin), health promotion (e.g. Chiasson, Li, Marcolin), marketing (e.g. Joy, Li, Zhu), socio-economic development (e.g. Chiasson, Culver, Sugden), stakeholder engagement and decision-making (e.g. Chiasson, Li, Sugden), sustainability (e.g. Culver, Pelletier), and technology and information systems (e.g. Chiasson, Marcolin, Zhu).

The Okanagan campus has a research support system through both the Office of Research Services (housing centralized research facilitation), and the Office of the Vice President Research (housing strategic project support and the University-Industry Liaison Office).

The Faculty of Management shares a research finance manager with the Faculty of Engineering, and recently hired a research coordinator. While some larger natural and health science labs on the Okanagan campus have research managers, to date no other Faculty has its own coordinator. This support is fundamental to the growth of the research capacity of the Faculty,

as well as the development of a vibrant research culture contributing to the campus priority of research excellence. The research coordinator's key roles are:

1. To help to increase our success with research funding
2. To facilitate interdisciplinary research partnerships, both intra- and inter-campus, as well as local, national and international
3. To enhance undergraduate and graduate research opportunities
4. To help increase our research impact (academic, social, economic, cultural)

Achievements

Current research collaborations

The Faculty is strongly focused on developing research collaborations, spanning the Okanagan campus and UBC more widely, as well as Canada and internationally.¹⁶ To illustrate:

- **Mike Chiasson** works with Kathy Rush (based in nursing in the Faculty of Health and Social Development at UBC's Okanagan campus), as well as partners from Thompson Rivers University and Interior Health (both in British Columbia). The project examines the development of "rural coalitions" in regional communities such as Princeton and Sorrento, and aims to understand the processes by which these coalitions make decisions around improving access to health resources in their communities. The project is funded by the Canadian Institute for Health Research (CIHR) Planning and Dissemination grant held by Rush, and a Social Sciences and Humanities Research Council (SSHRC) Insight Development grant (IDG) will be submitted in February 2017, led by Chiasson. He was also a co-applicant for a SSHRC Insight Grant (IG) in 2016 led by Susan Wells (based in social work in the Faculty of Health and Social Development at UBC's Okanagan campus), for a project that examines communicative practices in child welfare agencies.
- **Keith Culver** is the Director of the Western Economic Diversification (WD) funded initiative STAR (Survive and Thrive Applied Research), providing resources and infrastructure for industry-partnered research to faculty across campus. Culver is also the lead on the partnership between UBC's Okanagan campus, the property developer New Monaco Enterprises and the District Municipality of Peachland. This initiative includes School of

¹⁶ Journal articles, book chapters, books and edited volumes published since 2012 by faculty (with research in their contract and) currently working in Management, are listed in Appendix 5.1.

Engineering faculty Rehan Sadiq and Kasun Hewage. Culver has recently taken a leadership role in collaboration with Sadiq in establishing a partnership with the City of Kelowna on greenhouse gas emissions targets. This project includes a number of researchers at UBC's Okanagan campus: Carey Doberstein and Ross Hickey (based in political science and economics, respectively), and **Eric Li** from the Faculty of Management.

- **Annamma Joy** developed a SSHRC IG for the 2016 competition (see below) in collaboration with Bianca Grohman (York University, Canada). The project also includes local wineries, wine consultants, and researchers at the federal Pacific Agri-Food Research Centre in Summerland, BC. This application builds on funding from a SSHRC IDG, as well as an internal student training grant and a Mitacs-funded internship with Quail's Gate winery. Joy is the co-applicant on a SSHRC IG, "Luxury Consumption in India: A Culture in Transition" led by Russell Belk (York University). Joy is also in the planning stages of a project on the emergence of an Okanagan market for marijuana in the context of impending legalization in Canada. This project is being developed as a SSHRC IDG to be submitted in February 2017. For this project, Joy has potential collaborators based in psychology at UBC's Okanagan campus (in the Irving K Barer Schools of Arts and Sciences, IKBSAS).
- **Eric Li** was awarded a SSHRC IDG in 2016 to study rural community development and stakeholder engagement in the Okanagan, Shuswap and Boundary regions of British Columbia. Li's project examines how municipal stakeholders make decisions about resources and governance, and he is collaborating with Interior Health. Li is also engaged in an early-stage project with the Village of Lumby, developing rural health promotion strategies in an integrated knowledge translation model. A Michael Smith Foundation for Health Research C2 grant for \$15,000 was submitted in October 2016 to support this project. Li is also working on community development in collaboration with Carey Doberstein (based in political science at UBC's Okanagan campus, in IKBSAS) and Ross Hickey (based in economics at UBC's Okanagan campus, in IKBSAS) in an initiative with the city of Kelowna co-led by the Faculty of Management's **Keith Culver**.
- **Barb Marcolin** has a research partnership with Patricia Lasserre (based in computer science, in IKBSAS) and Homayoun Hajjaran (School of Engineering) on issues around data and systems management and interface design. Marcolin recently applied for a Compute Canada Research Platforms and Portals grant to support server space for use at UBC Okanagan to further her research on digital consent and data management. The Compute Canada project is supported by academic researchers and industry partners, and involves researchers from UBC's Okanagan campus Nathan Pelletier, Patricia Lasserre, Homayoun

Najjaran, and Constance Crompton (based in critical studies, in the Faculty of Creative and Critical Studies) and Ed Taylor (based in social work, Faculty of Health and Social Development), as well as researchers from other Canadian universities – Queen’s University, Western University, Simon Fraser University, and the University of Calgary.

- **Roger Sugden** is the Director of the Regional Socio-Economic Development Institute of Canada (RSEDIC), which houses several projects including a Western Economic Diversification (WD) funded partnership with KEDGE Business School (Bordeaux, France) on the British Columbia wine industry (see below), and a project on the history of occupations in the Okanagan. Sugden recently submitted a SSHRC Connections grant for the former project, and was awarded internal Humanities and Social Sciences grant for the latter project. The occupations project involves Ross Hickey, Paul Davies (based in psychology at UBC’s Okanagan campus, in IKBSAS, and an associate member of the Faculty of Management), and Ruth Frost (based in history at UBC’s Okanagan campus, in IKBSAS), as well as partners from the UBC Okanagan Library and UBC Archives. Externally, the project engages Westbank First Nation, multiple regional and municipal archives and libraries, and researchers at the University of Cambridge (England). Finally, Sugden is the RSEDIC lead on a project to develop an online community-university research portal, which is being undertaken in partnership with the Institute for Community Engaged Research (ICER) and the UBC Okanagan Library. This project has acquired funding from the IKBSAS Endowment Fund, and is seeking funding from the Vice Principal Research at UBC’s Okanagan campus, as well as the Canadian Internet Registration Authority.
- **David Walker** has a well-developed partnership with Danielle van Jaarsveld and Daniel Skarllicki (based at UBC’s Sauder School of Business on the Vancouver campus) studying customer behaviour and employee well-being in the service industry. Walker is the co-applicant on a SSHRC IG submitted in 2016 by van Jaarsveld aiming to continue this research. He also has potential collaborators in social work (based in the Faculty of Health and Social Development at UBC’s Okanagan campus).
- **Ying Zhu** submitted a SSHRC IG (see below) in 2016 to continue her work on touch-screen technology and consumer behaviour (funded in 2014 by a SSHRC IDG). Zhu’s IG was submitted in collaboration with Theodore Noseworthy and Russell Belk (marketing specialists from York University, Canada). Zhu also has a potential collaboration with Susan Holtzman (based in psychology at UBC’s Okanagan campus, in IKBSAS) to develop a collaborative research project on touch-screen technology and individual health.

Funding

Tenure-track faculty Bhardwaj, Fan, Li, Walker, and Zhu have been successful with the Social Sciences and Humanities Research Council of Canada's Insight Development grant (SSHRC IDG), which provides 1-2 years' funding of up to \$75,000 to support emerging scholars establish a research program. In Fall 2016, Zhu submitted a follow-up Insight grant (IG) to build on her IDG-funded project. The proposed project would bring in over \$100,000 over three years to support graduate students and research in the Faculty's Behavioural Research Lab, for which Zhu was one of the development leads. Tenured faculty Joy currently holds SSHRC funding as a co-applicant, and she recently submitted an IG to the 2016 competition as a follow-up to her IDG; a four-year project with a total budget of \$227,700 to conduct market analysis and sensory profiling research on Okanagan-grown merlots. In November 2016, Sugden submitted an Institutional application to SSHRC's Connection grant competition, which supports knowledge mobilization and networking. Sugden's project requested \$20,000 from SSHRC for a series of exhibitions throughout the Okanagan showcasing the history and development of the British Columbia wine industry. This project will disseminate the work of the UBC-KEDGE wine industry project, "Position the British Columbia Wine Industry for International Growth" (see below). Finally, Joy and Li have been successful in acquiring support through MITACS, providing dedicated funding for a graduate student to conduct research in collaboration with an industry partner.

The Faculty of Management generated \$211,500 in research funding in the 2015/16 fiscal year, which represents 2% of the campus-wide total. Over the past two fiscal years, SSHRC was the largest contributor. Overall, from 2011/12 to 2015/16, total faculty research funding increased by 58%. For the same year comparison, there has been a marked increase in average research grant funding per tenure stream faculty FTE (\$20,600), with a total increase of 87% (see Figure 5.1).

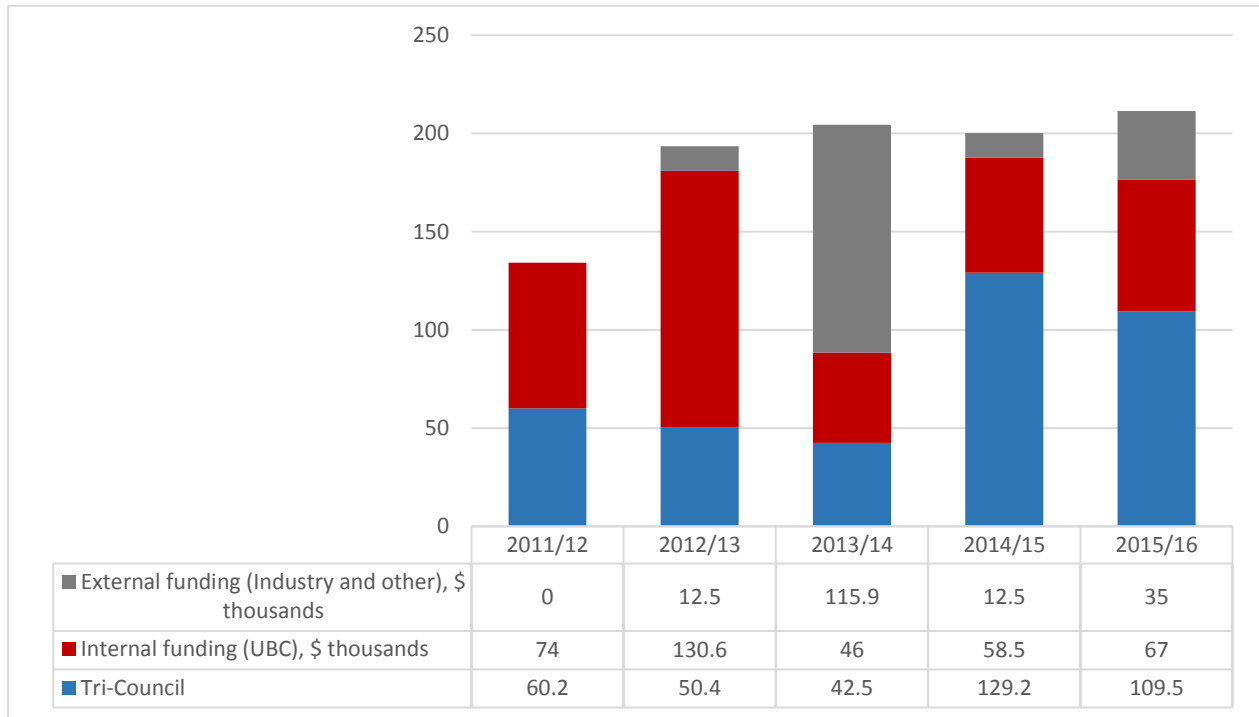


Figure 5.1: Sum of total faculty research award funding (by category), 2011/12 to 2015/16 (\$ thousands)

*Research funding data are not available for the complete 2016/17 fiscal year.

As previously mentioned, the Faculty’s annual research funding has increased over the last five years, from \$132,200 in 2011/2 to \$211,500 in 2015/16.¹⁷ However the institutional metrics reflect research-funding dollars flowing directly to a Faculty – in almost every case this is only possible when researchers hold funds in their own accounts as primary investigators or co-applicants on research grants, and in some cases projects with active research elements are omitted from the data. As a result of our focus on interdisciplinary research, the institutional metrics tend to underreport the involvement of Management faculty in funding activity. For example, Faculty colleagues have been critical to the campus securing almost \$4.5 million of funding from Western Economic Diversification Canada. This has been achieved through two main projects connecting local and regional communities, and providing hubs for international collaboration and innovation (in line with *Aspire: Envisioning Our Future*):

¹⁷ See Appendix 5.2, “Competitive Research Grant Funding 2012 – Present for Faculty with Research in their Contract and Currently Working in Management”, November 2016

- Survive and Thrive Applied Research (STAR), an initiative to connect UBC researchers with regional, national, and global partners, through innovative R & D; recipient of \$3.8 million from Western Economic Diversification Canada, principal applicant Sugden
- “Position the British Columbia Wine Industry for International Growth”; a \$1.3 million project, 50% funded by Western Economic Diversification Canada, and partially funded by industry, principal applicant Sugden

Each of these projects supports the aspiration of UBC’s Okanagan campus to be a driver of innovation with a positive impact on local and global economies.

Challenges

The size of the Faculty is the central challenge for the research enterprise, as it puts an in-principle limit on the capacity for growth in research. For example, with the current number of research active faculty members - 11 colleagues have research in their contracts (see [Section 7](#)) - there is a relatively low limit to Faculty research funding, because there are constraints on how much funding each researcher can hold at any given time. This challenge is exacerbated by a significant imbalance between junior and senior faculty, contributing to a gap in the capacity for mentorship. Within the Faculty, there is not a clear match between junior and senior faculty in terms of subject matter expertise or disciplinary knowledge, and the capacity for mentorship is also weakened because senior faculty are often overburdened with administrative duties. The problem of mentorship has an impact on the research culture within the Faculty.

The Faculty is proactive in addressing the challenges of size and mentorship. There are two senior hires underway, recruiting two full professors into the Faculty. These will have a major impact on our research culture in two key ways: by bringing strong, active research programs contributing to the research excellence of the Faculty; by providing capabilities and support in administration and service, helping to free up time for other senior researchers to pursue their own research and work with other faculty colleagues.

The Faculty is recruiting staff that can provide targeted support (for example research, and community engagement, and we will soon be appointing our own Faculty librarian – see [Section 1](#)). This support is vital to the continued development of the research culture across the Faculty, and most notably it can provide crucial assistance to junior faculty through the tenure process. A further step the Faculty has undertaken in the mentorship and development of faculty research is the recruitment of a senior faculty member from outside the Faculty as an associate member of Management, specifically to provide insight and guidance on promotion and tenure

(Mike Burgess, based in medicine on UBC's Okanagan campus). This appointment has been invaluable in ensuring the Faculty of Management grows and develops in a way that aligns with the opportunities and requirements of UBC system-wide.

An additional challenge to the research enterprise of the Faculty is the uncertainty around graduate programming on the Okanagan campus. Ongoing work with the Interdisciplinary Graduate Studies program during its redevelopment is especially important, as a strong graduate program is necessary for developing and sustaining a thriving research environment.

A further research challenge is the tension between teaching, service, community engagement, and research. The priority areas of *Aspire* (transformative student learning, research excellence, and community engagement) present competing priorities for faculty, especially those who have yet to be tenured. The competing priorities make it difficult for faculty to balance their efforts and outputs. We have structured support staff roles to assist faculty as much as possible, but tensions still exist.

Opportunities

The research opportunities for the Faculty stem from our inherent concern with interdisciplinarity, reflecting one of the key research priorities of the campus planning guideline, *Aspire: Envisioning Our Future*. This creates opportunities for research, and undergraduate and graduate student research training, not open to most other Faculties. For example, it is feasible that the Faculty, even with its small size, could hold funding from all three Tri-Council Agencies (comprising SSHRC, CIHR and the Natural Sciences and Engineering Research Council, NSERC). They are a major source of research funding for post-secondary institutions in Canada, and we already hold funding from two. In addition, faculty in Management often have critical expertise to the success of research projects in other faculties. Furthermore, due to the easily translatable nature of much management research, supporting "research in practice" - a major component of *Aspire's* research priorities - Management faculty can access private sector and philanthropic foundation funding more readily than some other academic disciplines. This potential for clear and concrete social and economic impact also creates opportunities for industry-partnered research that could be funded through Mitacs (a national non-profit organization that co-funds research internships for graduate students and post-doctoral fellows who partner with industry or community organizations) or private-sector contracts. This research, in practice, will support community engagement and opportunities for transformative learning.

Further opportunities arising from the Faculty's focus on interdisciplinarity include the development of a community-university research portal, a web interface providing a virtual entry point for community to access university researchers. The research portal project is an institutional collaboration between RSEDIC, the Institute for Community Engaged Research (ICER), and the UBC Okanagan Library.

RSEDIC also opens wider opportunities stemming from our interdisciplinarity. We are pursuing faculty recruits as joint-appointments with other faculties, and they will play a role in developing RSEDIC.

One cross-appointment was made between Biology (in IKBSAS) and Management in Summer 2016. Two more that are fully funded from the Faculty of Management budget are in the recruitment stage:

- In economic history, jointly with IKBSAS
- In innovation and design, jointly with the School of Engineering

These joint appointments allow for the development of expertise and depth, creating growth in research capacity outpacing the physical size of the Faculty. These joint appointments will not only benefit the Faculty but will also support UBC's Okanagan campus to co-create knowledge across traditional boundaries.

The full participation of the Faculty of Management in the College of Graduate Studies' process of revamping the IGS graduate program is another opportunity for research growth (see [Section 3](#)). The revamp includes the creation of clusters, or "themes" for interdisciplinary graduate study. These clusters will not only support the recruitment of excellent students, but also provide research collaboration opportunities for faculty. The participation of the Faculty in the multidisciplinary graduate programming on campus will support graduate students on UBC's Okanagan campus to work across disciplines to conduct research and develop academic and professional skills.

6. Leading, Administering and Organizing

Highlights

- Faculty organizational review and restructuring based on clear aims and objectives
- Collaboration in cross-campus activities and initiatives
- Creation of a faculty director position to support the restructuring

Since 2012, the Faculty of Management has identified a distinctive focus for its activities: diverse people managing and leading economic and social activity in varied organizations in internationally connected, rapidly changing and fast developing regions - including non-metropolitan regions (such as the Okanagan, where the Faculty is based).

The Faculty of Management has been structured to address various strategic and operational challenges. They range from clarifying tenure expectations and requirements; opening our existing co-op to students across campus; transforming the Bachelor of Management into a four-year program available to other Faculties; renewing the Master of Management curriculum and delivery focusing on our global engagement from a regional base; to extending our capacity in experiential learning, community engagement, communication and marketing. We have moved away from the model of a traditional stand-alone business school, and have laid the foundations for a management school focused on being an inter-disciplinary actor at the heart of integrated, cross-campus innovation and socio-economic impact, and located in the heart of an entrepreneurial, non-metropolitan region.

We are at a turning point: having reframed the Faculty and laid new foundations, we now need to build on that momentum and take an imaginative approach to research, teaching and community engagement in management at UBC's Okanagan campus.

Our Approach

The Faculty of Management set aims and objectives at a Faculty retreat in January 2013. The progress towards achieving them is detailed in the *Aims and Objectives 2013-2017 and 2016 Status Update*.¹⁸ We also took a new Faculty constitution through the Okanagan Senate.¹⁹ That

¹⁸ See Appendix 6.1 – Aims and Objectives 2013-2017 and 2016 Status Update

¹⁹ See Appendix 6.2 – Faculty Council of the Faculty of Management, April 2013

constitution empowers the Faculty Council of the Faculty of Management as the governance body for considering Faculty matters under the jurisdiction or requiring the approval of the Okanagan Senate. Any matter going forward to the Senate is voted on at Council. Faculty standing committees were also established:

- Research and Graduate Admissions Working Group, which considers proposals for supporting research, and for graduate courses and programming
- Masters of Management Curriculum and Admissions Working Group, which considers proposals for taught masters courses and programming
- Undergraduate Curriculum Working Group, which considers proposals for undergraduate courses and programmes

Further, in March 2013 we documented our approach to leading, managing and organizing the Faculty, learning from our experiences and challenges, and committing to systematically reviewing our structure to ensure increasing effectiveness.²⁰

Since 2013 we have faced a series of challenges in reorganizing the Faculty and corresponding processes to meet the requirements of UBC policies and the UBC/UBC Faculty Association Collective Agreement regarding the terms and conditions of faculty. Those challenges are ongoing. As a result, we have created new leadership roles, including faculty director, who carries many of the responsibilities of the Head under the Collective Agreement, with some responsibilities of the Head being with our Faculty Development Coordinator. We are in the midst of a process to clarify and codify the terms of those roles, and of reviewing our structure and organization.²¹

The Faculty of Management has recently reassessed our overall approach.²² We have a group of faculty and staff willing to collaborate in pursuit of common goals. The group:

- Includes academics and staff with diverse capabilities, experiences and histories, and who value that diversity
- Respects the (actual and delegated) decision-making responsibility of individual colleagues according to the functional hierarchies required by the university

²⁰ See Appendix 6.3 – Leading, Managing and Organizing the Faculty of Management, March 2013

²¹ Our current organizational chart is in Appendix 6.4 - Faculty of Management: Faculty and Staff Organizational Chart”, November 2016. See also Appendix 6.6 - Leading Faculty Roles, Dean/director, November 2016, and the discussion document in Appendix 6.5 - Faculty of Management: Focal Points for our Organization”, first draft August 2016, second draft November 2016.

²² See Appendix 6.7 - A Perspective on Organizing, Managing and Leading UBC’s Faculty of Management, August 2016

- Values decision-making on the basis of reason, evidence and sensibility, seeking consensus through consultation and sharing but subject to resource and timing constraints
- Recognizes that each colleague is independent yet also responsible to the others
- Acknowledges each colleague as a peer, in the sense that each is necessary for the success of the organization, notwithstanding differences in role, experience, capability and responsibility

In the Faculty we strive to be purposeful in everything we do, and emphasize the need to manage the challenges of our scale. Our objectives include:

- Achieving a significant rise in faculty and staff numbers
- Organizing ourselves for a sustainable scale
- Working as a group in setting and shaping our strategic aims
- Developing a culture of mutual and self awareness
- Refining and appreciating each of our roles
- Collaborating with other parts of the university

Interaction and integration with other parts of the campus

Our approach to leading, administering and organizing has put a particular emphasis on working with other parts of the university. The Faculty of Management is not a stand-alone school; instead, we seek to integrate with other parts of the Okanagan campus and UBC more widely. The study of diverse people managing and leading economic and social activity in varied organizations in internationally connected, rapidly changing and fast developing regions necessarily involves a wide range of disciplines, subject areas and expertise, typically found throughout a university, across the social sciences, humanities, arts and sciences. In other words, we best serve our research, teaching and community engagement aims – our faculty, staff, students, and community partners - by collaborating with other Faculties and administrative units. Moreover, the Faculty of Management is a micro-enterprise with aspirations for growth, but even with that growth there would be inefficiencies without cross-campus collaboration.

We have embraced and supported joint faculty appointments and taken a leadership role in developing innovative cross-campus programming, research institutes, and research facilities, closely connected to a range of regional and international partnerships. For example:

- Our newest faculty colleague (Nathan Pelletier) is a joint appointment with Biology in the Irving K Barber School of Arts and Sciences (IKBSAS), and we are working with employment consultants to jointly recruit senior colleagues with the School of Engineering, and with History in IKBSAS. This activity required us to develop clear appointment processes meeting the requirements of UBC policy and the UBC/UBC Faculty Association Collective Agreement.²³
- The Faculty of Management opened its successful co-op program to Okanagan campus students outside the management subject area (see [Section 4](#)).
- The Provost and Vice-Principal Academic of the Okanagan campus asked the Dean of the Faculty of Management to chair a cross-campus faculty working group, and a cross-campus administrative working group, to identify and explore new initiatives for inter-faculty programming. One example is [Interprise](#), a full-time, cohort-based experience, blending learning from multiple disciplines, focused on the sorts of challenges faced by internationally connected enterprises throughout the world. Running over one term (four months), starting 2017, *Interprise* culminates in a capstone project enabling students to learn by experiencing a real-time, real-life challenge putting innovation and change into practice. This initiative is also the subject of discussions with partner institutions across the world, for instance Management is currently leading discussions on a framework of understanding with Delft University of Technology (DUT) and UBC's Okanagan Campus, to grow a strategic partnership to explore the development and delivery of *Interprise*.
- Colleagues in the Faculty of Management have been at the core of developing the new [Regional Socio-Economic Development Institute of Canada](#) (RSEDIC).²⁴ The research institute envisions community engaged post-secondary education transforming the socio-economic development of regions. Through research and learning driven by community engagement, and through partnerships spanning post-secondary institutions, policy agencies, enterprises and other community organizations, its mission is to have a transformative impact on regional socio-economic development in British

²³ See Appendix 6.8, Faculty of Management, Joint Hiring Process, November 2015

²⁴ See Appendix 6.9 "Proposal under *UBC Okanagan Senate Policy 05: Research Centres and Research Institutes – Regional Socio-Economic Development Institute of Canada*", January 2015

Columbia Interior and comparable regions worldwide. Founding participants of RSEDIC include Management faculty Arjun Bhardwaj, Mike Burgess, Mike Chiasson, Keith Culver, Eric Li, Barb Marcolin, Roger Sugden and Ying Zhu; honorary research associate Marcela Valania; staff colleagues Carolyn Hopkins and Jamie Snow. The development of RSEDIC is being led by the Dean of the Faculty of Management, Roger Sugden, and our Associate Dean for Regional Innovation Practice, Keith Culver. The roots of RSEDIC on campus and in the Okanagan lie partly in the Okanagan Sustainability Institute (OIS), whose director was Keith Culver; the substantive ongoing research activities of OIS are now incorporated in RSEDIC. A report was prepared for the Okanagan Senate on initial RSEDIC activities.²⁵ Substantive RSEDIC partnerships are developed with KEDGE business school (Bordeaux, France), Glasgow School of Art (Scotland), Orkestra – Basque Institute of Competitiveness (Spain), and the Department of Public Leadership and Social Enterprise at the Open University (UK).

- Faculty and staff in the Faculty of Management have been at the core of developing [Survive and Thrive Applied Research \(STAR\)](#), a cross-campus initiative connecting organizations with world-class, UBC researchers and regional, national, and global partners; through innovative R & D, STAR aims to provide technical solutions to business challenges and support economic development and job creation in Western Canada. STAR's Director is Keith Culver, Associate Dean for Regional Innovation Practice in the Faculty of Management. The initiative, a collaboration with regional firms concerned with human performance in extreme environments, was developed by a working group led by Dean Roger Sugden.

²⁵ See Appendix 6.10 "Senate Update, May 2016, Regional Socio-Economic Development Institute of Canada (RSEDIC)"

7. People, Environment and Culture

Highlights

- Regular Faculty Council meetings and retreats, to progress on key issues
- Creation of a communications and marketing strategist position
- Establishment of faculty-student working groups

The Faculty of Management is a start-up organization in the early process of development. In the last four years, we have evolved into an inter-disciplinary school at the core of integrated, cross-campus innovation and socio-economic impact, capitalizing on its location in the heart of an entrepreneurial, non-metropolitan region.

There has been constant, rapid and sometimes turbulent change throughout our history, and aspects of the Faculty's working culture have been challenging for people - faculty, staff and students.

Faculty and staff

The current faculty and staff of the Faculty of Management are listed in Table 7.1.²⁶ We have a total headcount of 49 colleagues (plus two currently on leave):

- 11 tenured/tenure track faculty (plus 2 currently on leave); 4 professors, 1 associate professor and 6 assistant professors
- 4 lecturers
- 4 associate members
- 1 honorary research associate, 1 postdoctoral fellow and 1 visiting professor
- 15 adjunct professors and sessional lecturers
- 12 members of staff

²⁶ See Appendix 7.1 for a list of Management faculty and staff in position in 2012 and that have since departed, as well as those who joined after 2012.

Table 7.1: Faculty and Staff of the Faculty of Management, December 2016

TENURED/TENURE TRACK FACULTY, AND LECTURERS	
Name	Position
Dr. Arjun Bhardwaj	Assistant Professor
Dr. Mike Chiasson	Professor
Dr. Jacob Cho	Assistant Professor
Dr. Keith Culver	Professor
Ms. Tamara Ebl	Lecturer
Dr. Grace Fan	Assistant Professor – on leave
Dr. Annamma Joy	Professor
Dr. Svan Lembke	Lecturer
Dr. Eric Li	Assistant Professor
Dr. Barb Marcolin	Associate Professor
Dr. Nathan Pelletier	Assistant Professor; joint appointment with Biology - Irving K. Barber School for Arts and Science (IKBSAS)
Dr. Roger Sugden	Professor
Dr. Ian Stuart	Professor – on leave
Dr. David Walker	Assistant Professor
Ms. Norine Webster	Lecturer
Dr. Ying Zhu	Assistant Professor
Mr. Eric Zvaniga	Lecturer

ASSOCIATE MEMBERS	
Name	Home Faculty
Dr. Michael Burgess	School of Population and Public Health, Faculty of Medicine Southern Medical Program
Dr. Jan Cioe	IKBSAS – Psychology
Dr. Paul Davies	IKBSAS – Psychology
Dr. Derrick Wirtz	IKBSAS – Psychology

Honorary Research Associate, Postdoctoral and Visiting Professors	
Name	
Dr. Paul Ralph	Visiting Assistant Professor
Dr. Malida Mooken	Postdoctoral Research Fellow
Ms. Marcela Valania	Honorary Research Associate

Adjunct Professors and Sessional Lecturers		
Name		
Mr. Geoffrey Desmoulin	Ms. Elena Mitropolsky	Ms. Biggi Weischedel
Ms. Annette Fairweather	Ms. Monic Pratch	Ms. Sheila Westwell
Mr. Russel Fields	Ms. Connie Raddatz	Mr. John Whitehead
Ms. Sarah Gumpinger	Mr. Afzalur Rahman	
Mr. John Henderson	Mr. Greg Ruetz	
Mr. David Jenkins	Ms. Roberta Sawatzky	

STAFF	
Name	Position
Simone Blais	Communications Strategist
Mary Butterfield	Research Coordinator
Kristi Carter	Graduate Program Coordinator
Jennifer Hewitt	Undergraduate Program Coordinator
Carolyn Hopkins	Manager, Strategic Initiatives and Operations
Daniel Lamhonwah	MM Enrolment Advisor
Meghan Reid	Co-op and Career Coordinator
Jodi Ryan	Reception and Administrative Assistant
Caitlin Sirett	Deans Office Assistant
Jamie Snow	Community Engagement and Experiential Learning Coordinator
Patrick Vanderburg	Operations Assistant
Debb Wood	Faculty and Operations Administrator

Working climate

In July 2014, in conjunction with the campus human resources department, the Faculty underwent an external climate audit to understand better the characteristics of our internal work environment. All faculty and staff were confidentially interviewed by the auditor to better understand the issues, provide recommendations to help bring greater alignment to leadership, faculty and staff, and address any issues in a collegial, respectful manner. A number of themes emerged from the report, including:

- The history of multiple changes in governance structure
- Resource and structural concerns

- Alignment with the vision of the Faculty of Management
- The framing of conflict in relationships
- The role of policies, procedures and consultations
- Issues regarding communication and morale
- Faculty-staff separation
- Identity-based conflict

In response to the report, the Faculty has been seeking systematic change. We have instituted regular Faculty Council meetings to communicate with each other about key issues, as well as to discuss Faculty business requiring decision and action. In addition, we have introduced one-day, off campus retreats twice a year. They provide opportunities to gain better understanding of our distinctive subject matter, and to explore how we will realize the growth required for Faculty sustainability over the next 10 years. These regularly scheduled meetings focusing on both immediate and long-term issues are improving internal communications, facilitating effective voice, and enabling faculty to collaborate in finding solutions to challenges.

As of January 2016 the Faculty created a new position of communications and marketing strategist. This full-time staff position focuses on developing an overarching communications and marketing strategy, a communications and marketing plan for our undergraduate program redesign, and a redesign of the Faculty website. One aspect of this work is to assist with the program's identity both internally and externally, and to support internal communication. As part of the Faculty of Management's communications planning in 2016, the communications and marketing strategist invited faculty (tenured and tenure-track, lecturers, adjunct professors, and sessional instructors) to engage in one-on-one interviews. More than 80% of faculty expressed a desire to participate. As part of the audit, colleagues were asked for input on what was integral to the Faculty of Management's identity, and for creative ideas and best practices that they had seen elsewhere that might be considered in our case. They were also invited to evaluate internal communications, as well as indicate value on channels and mechanisms for updates and information. Rather than focusing explicitly on communications, many of the conversations during the one-on-one interviews turned to culture, and how a strong, collegial culture within the Faculty would foster a positive environment and greater opportunities for collaboration.

Ultimately, to support the evolution of a strong Faculty culture, communication and engagement must be a continuous effort. Notwithstanding progress, we still have difficult issues to tackle.

Faculty and staff development

We have taken significant steps to help faculty address their career and professional development (see [Section 6](#)). Through the new position of Faculty Development Coordinator, we have introduced greater clarity and stability to our faculty appointment, promotion and tenure processes.²⁷ Another new role (as of 2014) is Faculty director, through which we have brought greater coherence to the use of different contractual forms, notably lecturers, adjunct professors, and sessional instructors; and clarified the stress in our operations on equitable workload for all faculty.²⁸

The Faculty of Management has introduced an explicit approach to leading and organizing our activities focusing on the overall goals of the Faculty of Management, and providing faculty and staff with the freedom to take responsibility and initiative.²⁹ In outlining our approach we emphasize that:

- Alongside faculty and as peers in our organization, staff have responsibilities for making the administrative judgments about the operational delivery of our research and teaching agendas and, in doing so, for seeing opportunities and helping to set and shape strategic direction. This also implies a freedom, constrained by (*inter alia*) the academic judgments of faculty.
- Consistent with and respecting these different roles, all academics and staff have a voice on each aspect of the organization.

We have also taken steps to help staff address their career and professional development. UBC's grading standards for management and professional (M&P) staff positions are based on the roles and requirements of UBC's Vancouver campus. This has made it difficult to appropriately classify, or re-classify, and therefore promote staff positions on the Okanagan campus. The grading of positions is crucial to attracting and retaining capable and talented staff. While we are a young campus with lots of room for growth, we are at a pivotal point. We need

²⁷ See Appendix 6.4, "Faculty of Management: Faculty and Staff Organizational Chart", November 2016

²⁸ See Appendix 6.6, "Leading Faculty Roles, Dean/director" November 2016

²⁹ See Appendix 6.7, "A Perspective on Organizing, Managing and Leading UBC's Faculty of Management", August 2016

capable staff, whose responsibilities in a growth-orientated Faculty are different to those in an established Faculty with large staff numbers (the norm on the Vancouver campus). There is a risk that the classification of staff positions on the Okanagan campus is understood as merely a difference in volume and scale, rather than as the substantive difference in tasks and responsibilities.

Faculty-student relations

Two key aspects of faculty-student relations include our resourcing of in-Faculty student advising for both undergraduate and graduate programming, and our use of faculty/staff/student/community working groups.

Student advising

Since the Faculty's inception there has been dedicated advising support for students in the undergraduate and graduate programs through the undergraduate program coordinator and the graduate program coordinator. Over the years, Okanagan based Faculties have typically moved from an internal advising model to a centralized advising model. The Faculty of Management has remained unusual in its special focus on internal advising for students. As our programs continue to undergo significant change and growth, having direct student contact on issues, opportunities and successes remains very important to us. This awareness has allowed for problem identification and mitigation, and program planning, which have therefore provided a better overall student experience. Advising for undergraduate and graduate programs has ensured that students have properly planned their degree, will meet requirements to graduate on time, and can consult on progression and course issues. Our own Management advisors are aware of program issues that could cause concerns for students and faculty. A quick response to emerging issues is vital as they can cause students stress and lead to difficulties that, if not managed well, could require the diversion of significant internal resources.

The Faculty is nonetheless reviewing its capacity to support internal advising, due to the shift in the undergraduate program from 2+2 to four-year delivery (see [Section 1](#)). Further advising capacity will be required as the program grows. In addition, the four-year program will open the possibility of minors in management for students across campus. This will have a significant impact on students requiring support. Therefore, the Faculty is in discussions with Academic Advising, the central department for all campus programs, to work on formalizing and extending their advising services for Faculty of Management students, whilst continuing to have the

Faculty of Management's dedicated advisors work with students experiencing uncommon issues. Part of the request to central advising is to ensure that these issues come directly to the Faculty of Management undergraduate program coordinator for review and management. If the issue facing a particular student is deemed to have wider impact, this approach will allow us to proactively manage situations.

Faculty-student working groups

In 2014, after the Faculty experienced tension in some relationships with the student body around proposed undergraduate program changes, steps were taken to re-establish positive relationships. Involving a diverse group of faculty, students, alumni and, when appropriate, community members is important to an inclusive, healthy and vibrant Faculty. When complex issues arise the Faculty strikes a working group to review the issues and provide recommendations. This has provided great awareness for all parties, and increased support for implementing recommendations. The approach has also been beneficial in proposing creative ideas and solutions, maximizing the Faculty's ability to review scenarios, assess risks and achieve success.

The first of these working groups was the accounting working group, involving faculty, staff, students, alumni and community members, to consider alternative ways for sustainable delivery of accounting courses.³⁰ Focusing resources and course credit for a single profession can pose high risks for sustainable delivery. In addition, accounting courses for direct entry to the Canadian Professional Accounting (CPA) Professional Education Program are regulated by the CPA, which entails course mapping to those requirements, and significant Faculty resources. The accounting working group was tasked with making recommendations to the Dean's Office for sustainable delivery. Since the working group recommendations were presented to the Faculty, we have taken action to improve our program delivery. An innovative pilot course has been introduced, blending online delivery with face-to-face tutorials.

The second working group focused on student case competitions.³¹ The working group included students, staff, faculty, alumni and community members. The Faculty has an active and eager set of students who participate in a variety of domestic case competitions, providing opportunities for students to practice their in-classroom knowledge on case-based experiences, and to compete and network with peers from other post secondary institutions. However,

³⁰ See Appendix 7.2 for the working group terms of reference.

³¹ See Appendix 7.3 for its terms of reference

competitions require significant Faculty time and financial resources. In order to balance the necessary resources for undergraduate competitions with other Faculty priorities, the working group proposed to pilot a case-based workshop to support a large number of students wishing to participate in such competitions.

8. Support for the University's and Campus Strategic Plans

Highlights

- Breaking new ground in co-op and experiential learning
- Innovating in flexible learning
- Leading cross-campus, inter-disciplinary programming
- Developing new research partnerships

Throughout this report we have evidenced how the Faculty of Management has taken up the aims and objectives of *Aspire: Envisioning Our Future*, the strategic planning document for UBC's Okanagan campus, and currently a building block for the strategic plan being developed by UBC as a whole. Notably:

- We have redeveloped the Capstone Service Learning and Consulting course and Live Case Challenge - signature elements of the Bachelor of Management program - to provide students with enriched educational experiences (see [Section 1](#)), exactly as prioritized by *Aspire*.
- We have opened the Faculty's co-op program to students outside the Management subject area, enabling students across the Okanagan campus to benefit from potentially life-changing experiential education (see [Section 4](#))
- New relationships with community partners have opened opportunities for co-op placements, including through a presentation to the Aboriginal Education Council and discussions with Westbank First Nation, thereby "strengthening opportunities for learning and research collaboration with Aboriginal communities" (*Aspire*, p. 11).
- We have introduced undergraduate accounting courses delivered online with face-to-face tutorials by industry professionals, thus innovating around "more flexible structures for program delivery" (*Aspire*, p. 10); and we have made the Master of Management more accessible to working professionals by blending face-to-face learning in intensive in-residence experiences with online environments (see [Section 3](#)).
- We have redeveloped the Master of Management program around transformative learning, as defined in *Aspire* (see [Section 3](#)), prioritizing interdisciplinary, community-based experiential learning, and collaboration (peer learning, team-teaching and working with other UBC Faculties as well as international universities).

- We emphasise diversity, including in student recruitment; for example, the ethos of the Master of Management encapsulates deliberate appeal to non-traditional students, including First Nations students (see [Section 3](#)).
- We have led development of an innovative team-taught Interdisciplinary Graduate Studies course, *IGS 520J-003 Community Field Seminar in Socio-Technical Futures Focus: Our Future With Water*, enabling students to engage with a real world problem faced by a partner community around sustainable water supply (see [Section 3](#)).
- We have taken a leadership role in innovative cross-campus, inter-disciplinary programming, as called for by *Aspire*; for example *Interprise*, a full-time, cohort-based experience, blending learning from multiple disciplines, focused on the challenges faced by internationally connected enterprises throughout the world (see [Section 6](#))
- In our research, we have deliberately positioned the Faculty of Management at the nexus of the three main themes emerging in *Aspire*; we embody experiential and collaborative research, with regional and global impact (see [Section 5](#)).
- With its strong focus on interdisciplinarity, we have taken a leadership role in research across campus (see [Section 5](#)), for example by establishing the Regional Socio-Economic Development Institute of Canada (RSEDIC).
- We have developed research relationships with First Nations, in particular with Westbank First Nation through an interdisciplinary project on the history of occupations in the Okanagan (see [Section 5](#))
- On international engagement, we have contributed to fulfilling campus aspirations by delivering a Memorandum of Understanding and action with:
 - University of Barcelona, Spain, focused on GoGlobal student mobility (see [Section 1](#)) and European Union funded graduate programming
 - KEDGE Business School, Bordeaux, France, specifically on projects to impact the British Columbia wine industry (see [Section 5](#)), and with an eye on future developments through programming, and GoGlobal and other student mobility
 - Orkestra - Basque Institute of Competitiveness, for collaboration on research on regional socio-economic development, and delivery of the Master of Management (see [Section 6](#))
 - University of Cambridge, England, for research collaboration on the Okanagan's socio-economic development (see [Section 5](#))

- Looking to the future, we use *Aspire* as a critical anchor point in developing the Faculty's 10-year strategic plan, continuously reflecting on its aims and objectives so that we are aligned with UBC and campus priorities (see [Section 11](#)).

9. Physical Infrastructure

Highlights

- Based in the new Engineering, Management and Education Building
- Growth plans requiring increased office space
- Need for clash space for faculty, staff, students and community partners

The Faculty of Management has its offices, and some meeting and teaching space, in the Engineering, Management and Education Building (EME). The \$68 million, 16,769 square meter Gold Seal Standard EME was completed in 2012. It features five storeys of offices, lecture theatres, classrooms and meeting spaces. It has a green roof, and is outfitted with geo-thermal heating and cooling. The Faculty also makes use of teaching and meeting facilities spread across the Okanagan campus more widely.

Our immediate needs are reasonably catered for by EME and other facilities across campus, but we are beginning to face challenges. They will increase significantly as our growth plans are shaped and implemented.

Teaching Space, and Technology

Lack of space would constrain the realization of innovative programming and hinder growth:

- There are potential concerns in the future regarding classroom size – availability of a big enough lecture theatre for some classes, and the right number of larger classrooms - given that our 10-year plans will require significant growth in student numbers (see [Section 11](#)).
- New programming incorporating flexible learning will require adaptable space to suit course sizes and demands, for example a large classroom easily partitioned into smaller spaces.
- As we innovate our approach to teaching, there will be as yet unknown technology needs.

Faculty Space

- We are actively recruiting faculty jointly with other parts of UBC, and have a rising number of associate members whose prime base is in another UBC Faculty. Such appointments are essential to our inter-disciplinary, inter-Faculty, cross-campus aims and objectives. Their effectiveness requires “clash space”, i.e. space to interact with colleagues based in different Faculties on campus. Currently, faculty typically have one office in one Faculty, even when they are jointly appointed, and this can diminish opportunities for productive interaction.
- Our growth plan envisages a Faculty of Management with 40 tenure/tenure track faculty by 2027, with the corresponding number of lecturers, sessional instructors, adjuncts, and staff. This will require office space beyond our current allocation in EME.

Spaces Bringing Together Students, Faculty, Staff and Community

- Faculty and staff offices are all on the 4th floor of EME, where there is no teaching space. This might imply faculty and staff isolation from the student population, raising the need to be more creative in the use of space to engage with students.
- We have provided office space in EME for community partners, notably from Interior Health, as this enables interaction with faculty to open new research possibilities, enhance student experiential learning, and impact communities in practice. As we develop our community relationships we expect more demand for such interaction. One possibility might be further offices for community partners. Another could be provision of clash space.

10. Infrastructure and Resources

Highlights

- Budget commitments for 5 new faculty
- Projected revenue increases, from programming and research
- New budget processes, translating long run strategic priorities into everyday operations

Financial base

The Faculty's operating budget has risen from approximately \$3.8 million in 2011/12 to \$4.6 million in 2015/16.³² In 2015/16, approximately \$2.2 million came from tuition revenue, and \$2.2 million from our operating grant. The vast bulk of costs are accounted for by salaries, approximately \$3.9 million in 2015/16.

Our budget for 2017/18 includes funding for 3 new full professors and three new post-doctoral fellows. Two of those full professors are envisaged to be joint appointments fully funded by the Faculty of Management. Each of the two partner Faculties has in its budget a commitment to reciprocate with a joint appointment that it fully funds. In short, current budgets allow for 5 faculty and 2 post-doctoral fellows to join the Faculty of Management.

Assuming no new revenue streams, the Faculty of Management is currently forecasting total revenue in 2021/22 of \$6.2 million, with salary costs rising to \$4.9 million.³³ That budget would imply little or no more than maintaining our current faculty complement yet, for the Faculty to attain a sustainable scale, we recognize the necessity to grow significantly (see [Section 11](#)). We envisage that expansion will be underpinned by increased revenue from new programming.

Our current research income has grown significantly yet remains low in absolute terms - \$211,500 in 2015/15.³⁴ We have taken steps to increase our research income, for example by recently hiring a research coordinator to support the growth of Faculty research capacity (see [Section 5](#)).

The University has been supportive of Faculty-led initiatives by providing extra resources. For example, the Okanagan Provost Office provided extra funds for the innovative team-taught

³² See Appendix 0.2, Faculty of Management Composite Report.

³³ See Appendix 10.1, Faculty of Management Financial Overview, November 2016.

³⁴ See Appendix 0.2, Faculty of Management Composite Report.

Interdisciplinary Graduate Studies course, *IGS 520J-003 Community Field Seminar in Socio-Technical Futures Focus: Our Future With Water* (see [Section 3](#)); and the Deputy Vice Chancellor's Office has supported the marketing campaign for the new UBC Okanagan Co-op Education Program (see [Section 4](#)).

The Faculty currently has surpluses, arising in part from vacant faculty positions, and we recognize the necessity to invest that resource carefully in strategic opportunities. That includes investing in promoting programs to potential students, piloting new initiatives, and supporting faculty recruitment. The attraction of new faculty who will help to determine our future is paramount yet challenging in our subject area, not only because the labour market is thin but also because we are a new, small school based in a non-metropolitan region. We are working with outside employment consultants to increase the search pool.

The Faculty of Management has a new finance manager starting in January 2017. We aim to establish more efficient budget processes around our long term planning, focusing on strategic priorities and their translation into everyday operations. We will reflect on budgets for quarterly reporting with an eye on the 5-year and 10-year budgets, to ensure that we are on target and yielding maximum benefit from our resource.

Donors

We have been approaching donors by working with the campus Development and Alumni Engagement office. There has been success with scholarship funding for undergraduates and graduates,³⁵ the new UBC Okanagan Co-op Education Program, and the undergraduate Live Case Challenge (see [Section 4](#)).

Donors have expressed major interest in the Faculty of Management, regarding both impact on the region's socio-economic development, and the future for young people. As the Faculty grows we envisage appointing our own Faculty development officer to catalyze our donor funding, aligning it with our key initiatives. Our experience with the Faculty communications and marketing staff position, and our liaison and outreach librarian (see [Section 1](#) and [Section 7](#)), highlights the importance of embedded personnel who understand the Faculty, and can collaborate closely with colleagues at the heart of our strategy and operation.

³⁵ See Appendix 10.2 for a list of Faculty of Management scholarships and awards.

Growth, enrolment and infrastructure

As our current programs are at a point of growth, enrolment targets have been set above current norms. Student recruitment and admissions expect that changing the Bachelor of Management to a 4-year model (see [Section 1](#)) will attract higher demand, both domestically and internationally. Having our own communications and marketing specialist to spearhead undergraduate program promotion, is also expected to increase undergraduate enrolment.

To be sustainable we plan to have in place by 2022 the requirements for being 40 tenure/tenure track faculty by 2027 (see [Section 11](#)). This will require securing the necessary budget by offering an enhanced set of programs and having higher enrolment. Whilst our most immediate space and equipment needs are currently being reasonably met, such growth implies that we will soon require modified classroom availability and increased space for our activities (see [Section 9](#)).

11. Future Development

Goals

- Grow to 40 tenure/tenure track faculty
- Contribute to the development of an inter-faculty graduate program
- Collaborate with international partners to grow and enhance our research and programs

The Faculty of Management is at a turning point. From our small base we have reframed our direction and laid new foundations, and we now need to build, to realize in practice the distinctive opportunities for research, teaching and community engagement in the management subject area at UBC's Okanagan campus. To this end, the Faculty developed a path for the next phase of our activity.³⁶ These prospects will be refined and pursued over the next stage of our development, for example through systematic Faculty retreats, introduced in Summer 2016 and organized every six months.

In particular, we aim to plan for development and growth by focusing on the following prospects:

- So the Faculty can progress to a sustainable size, to have in place by 2022 the requirements for being 40 tenure/tenure track faculty by 2027, with the corresponding number of lecturers, sessional instructors, adjuncts, staff and students
 - To have 30 FTE tenure/tenure-track faculty, 50% of the 40 complement being joint appointments with other Faculties (with an average of 50/50 split for the joint appointments)
- For our faculty and staff – perhaps most especially the joint appointments - to be drivers of two initiatives that deliberately cross the Okanagan campus and UBC:
 - In research, the Regional Socio-Economic Development Institute of Canada
 - In programming, the 'inter-faculty administrative unit' being developed to run cross-campus activities for partner Faculties, including in subjects such as organizing, leading and managing regional socio-economic activity

³⁶ See Appendix 11.1 "The Development Path of UBC's Faculty of Management. From Reframing our Direction and Operation, to Creating our Distinctive Future", August 2016

In order to achieve success with our plans, there are many elements that we must address:³⁷

- Transitioning to the four-year Bachelor of Management, accompanied by a curriculum review to align the program consistently with the distinctive subject focus of the Faculty, an increase in its appeal to diverse students, and the development of corresponding minors
- Establishing the appeal of our distinct Master of Management to professionals in non-metropolitan regions
- Contributing to the development of an excellent inter-Faculty graduate research program, because such activity is essential in a thriving research university
- Bringing research, teaching and community engagement closer together, to avoid separation and collaborate on teaching and research activity
- Recruiting faculty and appointing existing faculty members elsewhere in UBC as associate members of the Faculty of Management, to build our distinctive, inter-disciplinary approach to teaching, research and community engagement
- Promoting the idea among faculty and across UBC that tenure and promotion may be based on impact beyond traditional scholarship
- Continuing to work with UBC's human resources department to understand staffing needs, given the Faculty of Management's current size, stage of development, and potential
- Increasing role clarity for faculty and staff, and developing those roles so as to be complementary, avoiding overlap and increasing efficiency
- Collaborating and sharing resources with other Faculties
- Collaborating with international partners in areas to enhance and push our performance.
- Securing the necessary budget to evolve into a larger Faculty in process, practice and structure

³⁷ See also Appendix 0.1, the SWOT analysis and Faculty priority areas presented at the UBC Board of Governors, October 2016.

- Setting and codifying new standards in organizing, managing and leading academic activities to achieve our aims, in line with UBC policies and processes, and according to our principles.

By focusing on these elements, we aim to build on the foundations that we have laid so that we acquire for UBC a world-renowned reputation for community engaged research and teaching that empowers diverse people to manage and lead economic and social activity through varied organizations in internationally connected, rapidly changing and fast developing regions - including non-metropolitan regions.

FACULTY OF MANAGEMENT RESPONSE TO RECOMMENDATIONS BY THE FACULTY EXTERNAL REVIEW

Recommendation 1 That student representation be included in Faculty retreats and other key Faculty meetings and committees.

Response

We welcome recommendations that increase student participation and involvement.

Student representation is already included in Faculty Councils but thus far not in retreats, as they have been focused on relationship building amongst faculty, and amongst faculty and staff. The Faculty of Management embraces the principle of effective consultation with students and we envisage that their involvement in retreats and other arenas will evolve over time.

In summer 2016, we established a faculty-student-working group to review Faculty-student relationships, and in particular to recommend how the relationships can be strengthened, including in innovative ways. It reported in May, 2017 – see *Faculty-Student Body Relationship Working Group Report. A roadmap for Management students, faculty and staff to connect meaningfully now and in the future*. We will be acting on the report's recommendations to make changes in the coming academic year. The working group and its report focused on undergraduate students, and as we act on its recommendations we will also use them to strengthen the relationship between the Faculty and graduate (including Master of Management and IGS) students.

Recommendation 2 The Faculty of Management must appropriately communicate the mission and vision to the management students, alumni and larger community.

Response

Prior to 2012 the Faculty had no specific vision reflecting the aspirations of the Okanagan campus, and founded on the commitments and values of UBC. Since then, faculty and staff - building on engagement with students - have collectively identified a distinctive vision:

A Faculty that is world-renowned for community engaged research and teaching of management knowledge that empowers diverse people to manage and lead economic and social activity through varied organizations in internationally connected, rapidly changing and fast developing regions - including non-metropolitan regions.

Development of that vision, and its endorsement by Faculty Council, is a major achievement for the Faculty. Communicating such a vision without that consensus would have harmed development.

The consensus building-approach positions us to engage a wider audience. Doing so is a priority that we are deliberately pursuing. For example, we hired a full-time communications and marketing strategist early in 2016 that is dedicated to the Faculty. Working with faculty, the new hire has completed extensive groundwork to improve messaging. We are now developing clearer communications with a wider audience - prospective students, students, alumni and the larger community – both about our vision, and about our successes, disciplinary and interdisciplinary research projects (and research activities), relevance of new programs, and opportunities for collaboration and interaction. For instance, in our work with community partners in the Live Case Challenge for third year undergraduates, in the Healthy Living Projects that are part of the third year Introduction to Marketing course, in Capstone projects for fourth years, and in Coop activities, we are piloting exploration of topics and relationships that provide specific content to communicate our mission and vision. As a new, smaller program, the Master of Management enables us to

explore ways of realizing and communicating our Faculty mission and vision, for subsequent translation into the broader context of the larger undergraduate program. Such developments in our communications will be enhanced through our existing plan to establish a community advisory group, to provide guidance and ambassadorial support with our various stakeholders. We expect that advisory group to be in place early in 2018.

Recommendation 3 That the Dean meet regularly with the leadership of the Management Student Association.

Response

We welcome this recommendation and agree with the need to meet regularly with the Management Student Association (MSA).

The Dean and members of the Dean's Office have engaged with the MSA and the wider student body very frequently since fall 2012, generally on an event- or issue-specific basis. Our objective is to balance attention to a key student group with ensuring that students who opt not to participate in the MSA continue to have avenues for raising concerns. Membership of the MSA is currently confined to Bachelor of Management students, not all of whom are active in the MSA. As a Faculty, we are aware of our responsibilities to all students in the Faculty and on campus interested in and studying management subject areas.

Here too the May 2017 *Faculty-Student Body Relationship Working Group Report* is important. For example, it recommended development of an annual orientation meeting for MSA and JDC West executives, and Faculty of Management leadership. That has been introduced for Fall 2017. We are also exploring new ideas around 'town halls' for the Dean and Faculty leadership, in-class 'Dean updates', and possibilities to increase 'interaction hubs', spaces for the Dean, faculty, staff and students to engage, strengthening a process of mutual trust and understanding.

Recommendation 4 The Faculty should immediately embark on a process to revise the curriculum to reflect the vision of UBC Okanagan and to differentiate it from other business schools in the marketplace. This should include the creation of majors and interdisciplinary themes such as sustainability, regional development, and innovation, all of which are embedded in the program.

Response

Since 2012, we have been revising course content and curricula, in line with the vision of the campus and our emerging, Faculty-specific vision. We have also reviewed the 2+2 structure of the Bachelor of Management and found there was room for improvement, for example because it has relatively very few Management courses in the first two years of study. As a result, with Okanagan Senate approval in 2016 we are shifting into a four-year program, beginning September 2017. This delivery change must be carefully managed to ensure that all students on both undergraduate programs continue to receive top-quality education. We must simultaneously ensure planning for Faculty leadership succession and hiring of new faculty members.

We acknowledge the importance of establishing our uniqueness as a Faculty with globally competitive programs that utilize our region's special assets and opportunities. We plan to develop new concentrations as resources and necessary collaborative relations with other Faculties permit. As we develop new concentrations, we will prioritize sustainability, regional development and innovation as leading topics, potentially accompanied by other opportunities arising from campus and wider UBC perspectives. In this spirit, two Faculty members are currently contributing to an inter-Faculty working group (four Okanagan Faculties are represented) to develop a proposal for a sustainability theme in the Interdisciplinary Graduate

Studies program, and the Faculty is also contributing to cross-campus discussions to develop a theme on 'regionality'.

The new four-year program offers a vehicle to engage better with global and regional opportunities, and the possibility to review curriculum holistically, in line with our vision, and consistent with managing the stresses and demands already placed on key Faculty officers. That review is a priority and we have already taken action. It was the focus of our Faculty retreat in summer 2017, which identified possibilities for altering course delivery, for example through revised lecture/workshop arrangements, and flipped classrooms. Those possibilities have been taken up in a further faculty meeting, and by the Undergraduate Curriculum Working Group. In exploring such possibilities, we are again drawing on our work in, for example, the Live Case Challenge, Healthy Living Projects, Capstone, and Coop, all of which pilot approaches that reflect our vision, and differentiation from typical business schools. As a new, smaller program, the Master of Management also enables us to explore our approach, for subsequent translation into the broader context of the larger undergraduate program.

Recommendation 5 Significant efforts must be made to appropriately brand and position the Bachelor of Management program at UBC Okanagan to avoid confusion with traditional business programs.

Response

We welcome this advice as confirmation of our ongoing approach to differentiation of our Bachelor of Management from traditional business programs. We fully appreciate that this is an ongoing process that we have only thus far initiated.

Key elements of our approach include appointment of the Faculty's communications and marketing strategist in early 2016, and our close cooperation with University student recruitment services. We initiated discussions in Summer 2017 with student recruitment and advising, and University relations, to align the various parts of UBC's activity in this area. We also anticipate expanding our efforts with the advice of the community advisory group that we have under development, to provide ambassadorial support with various stakeholders. We are drawing on the insights of the May 2017 *Faculty-Student Body Relationship Working Group Report* to reinforce the same message. We are taking a leading role on the campus in emphasising faculty joint appointments, and the unique opportunities this strategy affords with respect to moving beyond traditional business programs in fulfillment of the new Faculty vision.

Recommendation 6 That the Faculty of Management at UBC Okanagan develop and implement both Indigenous content to embed into the management curriculum and a strategy to recruit Indigenous students into the program. This may include but is not limited to the hiring of Indigenous staff and faculty.

Response

The Faculty has been aware of the need to develop partnerships and collaborations with First Nations and other communities. We have sought to develop relationships based on respect, trust and understanding, thereby offering a foundation to identify long-lasting mutual interests, and are mindful of our responsibility to undertake such efforts as part of an entire campus. We welcome a recommendation that reinforces the importance we attach to such matters.

Our approach seeks to ensure a solid foundation for embedding First Nations content into our programs, recruiting First Nations students, and hiring First Nations faculty and staff. We have supported and recognized First Nations students, successfully sought to recruit First Nations students, and deliberately revised our Master of Management curriculum to be relevant to First Nations interests. We pursue agendas that are identified and embraced by First Nations, intentionally move one step at a time, and evolve

deliberately, seeking to operate collaboratively across the Okanagan campus. Our aim is to foster conditions for the co-creation of curriculum, student support and research projects that are relevant to First Nations. This approach is illustrated by our developing relationship with Westbank First Nation, for example regarding course content for the Master of Management, possibilities for coop education, and understanding rapid socio-economic change in the Okanagan Nation Territory. We are actively exploring with partner Faculties joint appointments that would enable our approach to be acted upon all the more quickly and effectively.

Recommendation 7 *The Faculty should provide each IGS management student with a desk/carrel in close proximity or on the same floor as the Faculty of Management.*

Response

We recognize the suggestion as an ideal situation, and that its implementation poses challenges that are being faced by all Faculties in the Okanagan. In the context of a campus-wide space shortage driven by growth, including in graduate enrolment, we are reviewing options for renovation of Faculty of Management space on the 4th floor of the EME building in ways that will better accommodate graduate students.

We have estimates in hand for renovation of our current photocopier room. We will reach a decision on action in conjunction with planning for ‘interaction hubs’ that support greater collegiality amongst the Dean, faculty, staff and both undergraduate and graduate students. It may be difficult to reconcile our ambitions for growth with limited campus space, so our plan will require flexibility to include ‘satellite’ sites for faculty, staff, and students in locations other than our main 4th floor EME presence.

Recommendation 8 *That the Faculty of Management institute a seminar series inviting top scholars to present their work at UBC Okanagan. Graduate students should be required to attend a certain number of seminars on an annual basis.*

Response

The Faculty has hosted periodic research seminars and workshops in recent years, both within the Faculty and for the wider community. Students have been systematically encouraged to participate. The seminars have been given by colleagues in UBC, and by leading scholars invited from elsewhere.

It has been difficult to find a formula that is sustainable in terms of embedding regular activities, because of our small size and breadth of subject matter specialism, and our current research culture. We continue to innovate: for example, the Faculty director is now experimenting with a series of ‘coffee conversations’ to help shape our research culture, and with a view to the conversations evolving into a systematic seminar series. The development of cross-faculty themes around a critical mass of research-active faculty and students in the renewed Interdisciplinary Graduate Studies would help such efforts.

We wholeheartedly acknowledge that thriving seminar and workshop activity within the Faculty is vital in a culture that effectively supports the highest levels of research. That activity is an important complement to participation in external conferences, etc., an area where faculty are supported and active. We also have recruitment of a Faculty research lead on our agenda. We would expect that colleague to pursue further success in these regards.

Recommendation 9 Care should be taken not to divert resources or attention from the needs of the undergraduate program as the Masters of Management is implemented and grows.

Response

The Bachelor of Management is a top priority and we are mindful of not diverting resources from its needs as the Master of Management is implemented and grows.

The Faculty is viewed holistically, for example in terms of programs enhancing each other. Success in each area contributes to success in others, and to the general reputation of the Faculty. The decline in enrolment in the Master's by the 2012/13 academic year led us to suspend admissions and transform the program from a nine-month, full-time degree for recent undergraduates from non-management disciplines, to a 25-month, part-time, blended-learning program for professionals working in or with non-metropolitan regions. This transformation aligned the Master's with our Faculty vision. In doing so we have contributed significantly to campus development and taken up the aims and objectives of *Aspire: Envisioning Our Future*, the strategic planning document for UBC's Okanagan campus, and an input for the strategic plan currently being developed for UBC as a whole. We have deliberately paced resumption of admissions to the Master's with, uppermost in mind, a concern not to divert resources or attention from the needs of the undergraduate program. The first cohort on the new Master's started their study in summer 2017. We envisage that the success of the Master's will enhance our Faculty reputation. Not least, it is already helping us to understand and refine our messaging for the Bachelor's. It is also offering faculty, especially junior faculty, a new avenue for translation of research into teaching first at graduate level, then, with suitable adjustment, into undergraduate teaching.

Recommendation 10 The Faculty of Management should develop a visiting scholar program bringing senior scholars to UBC Okanagan for a one to two-week period. The visiting scholar should be tasked with mentoring and assisting existing faculty members with their research.

Response

This suggestion confirms our acknowledgement of the need for visiting scholars, which had already been taken up in our latest round of faculty recruitment. The possibility of visitors is now being considered by faculty, who have been asked to suggest candidates. Visitors who could support pre-tenure faculty and graduate students with their research would be especially appealing. In the context of the Master of Management, we have ongoing international collaborations, which include bringing senior scholars from partner institutions to the Okanagan for a sequence of visits, to contribute to research seminars and specialized summer schools. In Summer 2017, there were visitors around the Master of Management from KEDGE Business School (France), Orkestra – Basque Institute of Competitiveness (Spain), and the Glasgow School of Art (Scotland).

Recommendation 11 To create a research culture fitting with UBC Okanagan, the Faculty of Management should pursue an aggressive policy to hire promising scholars at the rank of Assistant Professor. Incoming new faculty members should be provided with significant start-up research funds (from internal resources if necessary).

Response

We agree that our success depends on being able to recruit highly talented faculty who will help us progress to the next level and become sustainable.

Our aim is to have a mix of emerging and experienced colleagues, to provide a vibrant and supportive academic culture that sustains an appropriate blend of research, teaching, service and community engagement. Most recently, and having appointed an Assistant Professor in 2016, that aim led us to target recruitment of full and Associate Professors who could support the disproportionately large body of pre-tenure colleagues, and help grow activities to enhance our sustainability. For example, in the 2016/2017 recruitment round we focused on two leadership positions, each accompanied by a post-doctoral fellow (with research and teaching responsibilities). The post-doctoral fellow is seen as part of the start-up support for the senior colleague, and a way of recruiting emerging talent without requiring fulfillment of tenure-track obligations too early in a given scholar's career. For the 2017/2018 recruitment round, Faculty Council has endorsed a mix of positions: an Associate/full Professor who would have an administrative appointment as director; an Associate/full Professor of finance; a tenured instructor at any rank with leadership responsibility regarding undergraduate learning; and an Assistant/Associate Professor jointly appointed with another UBC Faculty. Following successful recruitment to some of these positions, we plan further recruitment of Assistant Professors, to complement and benefit from the experienced colleagues.

Throughout, we will continue to remain alert to opportunities, including the prospect of attracting a group of scholars at different levels and working in a subject area that would fit our strategic development plans. We anticipate that this approach, benefiting from lessons learned in prior recruitment cycles, will gain from increased clarity and comprehensiveness in our communications. We expect to use communications regarding the four-year Bachelor of Management and re-launched Master of Management to position better the attractiveness of the Faculty as a new unit on the new campus of an established university, offering faculty considerable opportunity to shape academic programs and community impact in ways less available in more established academic and external community cultures.

As regards start-up research funds, and as illustrated by our approach to including post-doctoral fellows as part of the package for experienced faculty, we fully recognize their undoubted significance for the success of each colleague. We are committed to using significant Faculty funds to this end. We are also investing in the development of our research culture in other, complementary ways, for example by having appointed a research coordinator and a research librarian.

Recommendation 12 *To facilitate retention, the Faculty of Management should consider creating a fellowship, professorship, or Chair program to support young faculty.*

Response

The idea that the Faculty consider creating a fellowship, professorship, or Chair program to support young faculty is very appealing. We will take it up with the Office of Research Services at the Okanagan campus, to explore how best this could be achieved. In doing so, we will use the necessity of fundraising to further engage community partners. Implementing this recommendation will build on the approach taken with the Faculty's newest assistant professor. He joined in summer 2016 as a joint appointment with biology in the Irving K Barber Schools of Arts and Sciences (51% Biology, 49% Management). One of his immediate objectives was to apply for an NSERC industrial research chair. We have provided significant resources to support the application.

Recommendation 13 *Over the next year, the Faculty of Management should develop a five-year strategic plan outlining a mission, vision and values for the Faculty. The plan should include clear strategic priorities for the Faculty. The development of the plan should include widespread meaningful consultation with all relevant stakeholders. An outside facilitator should be hired to oversee the process and develop an initial draft of the Strategic Plan.*

Response

The Faculty has deliberately moved away from the model of a traditional stand-alone business school and, since 2012, laid the foundations to be an inter-disciplinary school at the core of integrated, cross-campus innovation and regional socio-economic impact. We have done so by taking up the aims and objectives of the campus strategic planning document, *Aspire: Envisioning Our Future*. Having laid those foundations, we agree that we are now ready to develop our own, Faculty of Management strategic plan, in step with the renewal of UBC's strategic plan that is currently underway.

We welcome and recognize as essential the recommendation that we work with an external facilitator to formulate the plan, grounded in engagement and consultations with faculty, staff, students, alumni, prospective students, communities and other stakeholders. Our plan will be aligned with the currently emerging UBC plan, and the UBC requirement for international excellence. Explicitly informed by a broader ten-year outlook, it will identify clear actions for the period until 2022. We have already begun discussions with an outside facilitator.

Recommendation 14 *Given the current state of the Faculty of Management, the position of the Dean must be fully committed to the internal needs of the Faculty of Management. The Dean should have a highly visible office within the Faculty of Management and dedicate their efforts to repairing and building the management program.*

Response

We will create a visible Dean's Office as an 'interaction hub' for faculty, staff, students, community partners, and the Dean. The options will be explored by a working group of faculty, staff and students, chaired by the Dean. Creative possibilities will be considered, to address both faculty interactions and increased Dean accessibility to students. These might include set times when the Dean and Faculty leadership are available, and opportunities to share coffee or lunch.

This must be achieved in a context where there is no teaching space on the EME fourth floor, and students currently have limited opportunities to be in that part of the building for both organized and informal interaction with faculty. One possibility, for example, is an open plan office shared by the Dean and some willing faculty - perhaps joint appointments whose principal office is in another Faculty, and who would use space in EME to interact with Management - together with staff and student representatives.

Recommendation 15 *The Faculty should consider an aggressive hiring campaign to address the faculty shortage. A coordinated effort should be made for multiple positions to be advertised at one time.*

Response

We are encouraged by the emphasis on growth of the faculty complement as a key element in program growth and long-term Faculty sustainability. We are committed to continuing to pursue multiple positions in creative ways, appropriate to our stature as a small Faculty that is rebuilding on renewed foundations on a new campus.

To date, we have created joint appointment processes and used search consultants to improve the quality of candidate pools, and we have implemented novel support packages such as postdoctoral fellowships as part of recruitment and start-up support. We will continue to assess the global marketplace for academic talent to identify candidate pools that we can access via carefully calibrated recruitment communication. Throughout these efforts, we will maintain the quality standards that will support the growth and development necessary for establishing the Faculty of Management as an integral part of one of the world's leading universities. In doing this, we expect success to breed success. Whilst our current Faculty size places considerable pressure on a very small number of existing faculty colleagues in the recruitment process, as we grow the workload can be spread differently.

Recommendation 16 *The Faculty of Management should encourage faculty to teach across two terms. This will help with collegiality, physical presence on the floor, and raise service capacity.*

Response

Teaching in one term was established as a norm in the Faculty prior to 2012 (albeit this is not the practice across the Okanagan campus). That norm clearly raises difficulties in terms of collegiality and work environment, and since 2012 some colleagues have responded to encouragement by enthusiastically embracing change. Further change is required, in light of campus needs, and Canadian and global trends toward increased flexibility in the time and place of delivery of academic programs.

We have already taken the opportunity to explore increased flexibility in timing of teaching with the blended delivery model adopted for the renewed Master of Management, and the blended delivery of accounting courses for undergraduates. Such developments have been taken up at the Faculty retreat in summer 2017 as exemplars for wider adoption. The recommendation of the external reviewers will be used as a basis for providing more encouragement to teach across terms.

Recommendation 17 *UBC Okanagan may be well advised to bring in an outside mediator to try and facilitate an improvement in individual mindsets and cross member relationships within the Faculty of Management.*

Response

We are conscious of issues in our Faculty culture and climate. We have taken both formal and informal steps to identify and respond to specific issues, in addition to general matters of morale and collegiality. In July 2014, in collaboration with the campus human resources department, the Faculty requested and underwent an external climate audit to understand better the characteristics of our internal work environment. All faculty and staff were confidentially interviewed by the auditor. The aim was to help bring greater alignment amongst leadership, faculty and staff; and to enable members of the Faculty to address issues in a collegial, respectful manner. In response to the auditor's report, the Faculty has been seeking systematic change in behaviours and organization - for example, by instituting regular Faculty Council meetings and off-campus retreats to communicate with each other about key concerns, facilitate effective voice, and enable collaboration in finding solutions to challenges. We have also sought change by appointing an adjunct professor with service responsibilities that include coaching and mentoring of faculty and staff through our transition and growth.

Ultimately, to support the evolution of a strong Faculty culture, communication and engagement must be a continuous effort. Notwithstanding progress, we recognize that we still have difficult issues to tackle in our work together as a Faculty, in a context of rapid campus evolution and system-level changes. We fully

embrace the need to improve mindsets and cross member relationships. We appreciate that such improvement is required and expected.

Following discussion with the Provost and Vice-Principal Academic at UBC's Okanagan campus, and bearing in mind the continuous change currently underway, it has been agreed that at this point there would be no benefit from bringing in another outside mediator. At the same time, we are conscious that the immediate value of a strategic planning process facilitated from outside the Faculty, provides another opportunity to reset our development path.

Recommendation 18 *The leadership of the Faculty of Management must better engage all members of the Faculty in outside collaborations and research opportunities.*

Response

There is substantial scope for faculty to become more engaged in the Faculty's community collaborations and research opportunities in the future, taking up possibilities introduced and acknowledged in fora including Faculty Council and Faculty retreats. Further attempts are underway to encourage and enable faculty, especially pre-tenure faculty, to contribute to community-engaged research with global relevance.

The Dean's Office will continue to improve communications regarding new opportunities, and the status of existing projects and partnerships. These will include projects undertaken by research institutes and initiatives, such as the Regional Socio-Economic Development Institute of Canada (RSEDIC), the Institute for Community Engaged Research (ICER), and Survive and Thrive Applied Research (STAR). Further possibilities for faculty participation are expected to arise from individual faculty activities conducted with knowledge of the agreed Faculty vision and direction: individual faculty members will both 'bring home' opportunities for colleagues from various professional networks, and open the way to small team participation from the Faculty in larger networks in the province, Western Canada, nationally and internationally. The Dean's Office will provide developmental support to such initiatives, especially to the extent that they involve multiple faculty in larger research programs advancing campus and UBC priorities.

Research and collaborative opportunities in the Faculty benefit from dedicated efforts since 2012 to develop community partnerships that are characterized by mutual understanding and trust, reinforcing interdependence between the university and its stakeholders. These partnerships establish a foundation for faculty and communities to identify durable, mutually beneficial activities in research-led teaching. From a starting-point where UBC sometimes had a reputation in the Okanagan for being insufficiently engaged in issues relevant to particular communities, Faculty of Management research and education have become better oriented to regional concerns, and better appreciated in those communities. We are committed to continuing and reinforcing this approach in the future.

As we have conducted pilot activities in collaboration with key local and regional stakeholders, we have supported individual faculty in developing one-to-one relationships with partners. We have, for example, supported faculty in embedding community-based experiential learning in particular courses, and in developing their own research agendas, drawing on those community relationships. All faculty have also been welcome to join in opportunities that span the Faculty, based on support for the Faculty as a whole, and willingness to engage collegially, aiming to understand the needs of community partners and build relationships. In this regard, we have had encouraging initial success, which remains to be fully realized by faculty members regarding regional opportunities as valuable to both immediate participants and wider scholarly audiences. For example, there has been some faculty participation in the Western Economic Diversification-supported RSEDIC project, "Position the British Columbia Wine Industry for International Growth". Similarly, faculty have engaged in preliminary fashion in the international research workshops

organized in collaboration with Westbank First Nation, to help understand socio-economic change in the Okanagan with particular reference to First Nations communities.

We nonetheless agree that performance must improve through better communication efforts from the Dean's Office, and from increased recognition of the scholarly interest of regional issues by faculty members. As a result, faculty and communities will be able to achieve long-lasting, shared success. This is being pursued by, for example, systematically providing updates at Faculty Council, and inviting all colleagues to share their experiences so that new opportunities might be fashioned together.

Recommendation 19 *The Faculty should allocate a portion of its carryover funds to support graduate students and faculty. Funds for research, conference travel, research assistantship etc. should be significantly increased to build success, and goodwill, with faculty and graduate students.*

Response

We acknowledge and accept the recommendation that funds for research, conference travel, research assistantship, etc. should be significantly increased.

We are reviewing our budget commitments, focusing on changes that can support ongoing, lasting improvements without reliance on non-continuing budget surpluses available on a temporary basis. We will also revisit faculty awareness of funding opportunities, noting that the currently available Dean's Office travel grant has been undersubscribed, and university-wide subventions have been similarly under-utilized by the Faculty. Suggestions for establishing an annual allowance or 'operating funds' to support the individual research agendas of faculty have been requested, and will be taken to a future Faculty Council for discussion. New arrangements for graduates and post-doctoral fellows will be similarly addressed.

Recommendation 20 *The Dean should institute a more transparent budgeting process sharing on an annual basis with the Faculty a high-level version of the budget and budgeting process.*

Response

We are committed to collegial participation in governance processes, including those elements of budget planning for which the Faculty is responsible. Budget planning for the Okanagan campus has evolved rapidly since 2012, and there has been a fundamental change in budget model. In this changing environment, information-sharing in the Faculty has been sporadic and largely unsystematic. That has limited the effectiveness of our efforts to inform and consult faculty regarding options and constraints.

We will increase information-sharing about the budget and budgeting process at Faculty Councils as much as possible, given what is provided by the campus and University, and taking care to ensure that information is used collegially, consistent with the vision and values of the Faculty. This will enable us to identify options for the support of daily and strategic priorities. We will also consider budget scenario planning and UBC system governance education in the Faculty of Management retreats, to enhance faculty understanding of growth options, so that they can deliberate possibilities for future development in the context of the Okanagan campus and UBC system. Indeed, this innovation has already been introduced, at the Faculty retreat in summer 2017.