

External Review of UBC Okanagan Faculty of Management

For the Period 2017/18 - 2021/2022

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Table of Contents

Context and Overview	1
Themes and Highlights	2
Undergraduate Education and Student Learning	5
Student Academic Experience and Support	9
Graduate Education	10
Research, Scholarly and Professional Activity	13
Leadership and Administration	15
People, Environment and Culture	17
Community Engagement	21
Support for the University's and Campus Strategic Plans	23
Physical and Other Infrastructure and Resources	23
Future Development	26

Context and Overview

The purpose of the UBC-O Faculty of Management (FoM) external review as stated in the Terms of Reference is to:

“... lay foundations for longer-term development of the Faculty of Management as an ongoing, integral contributor to the academic vision and activity of UBC in the Okanagan. Specifically, the intention of the review is:

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.”

We thank the administration, faculty, and staff of the FoM and of other units in UBC-O for their efforts in preparing materials for the review time and in taking the time to meet with us over a three day period. The efforts of everyone, and the candidness of the views shared, are very much appreciated by the Review Team.

We note the following key aspects of the environment to provide a better sense of the FoM’s positioning and development, with an emphasis on more recent years:

- The importance to the FoM of UBC-O’s vision themes as documented in the *Aspire 2014* report of: innovation; interdisciplinary programming and research; having impact on local and global communities; expanding student experiential learning opportunities; undergraduate and graduate student research opportunities; creating innovation hubs for all stakeholders to collaborate; and flexibility in program delivery;
- The growth of student enrolments in the FoM from 843 in 2016/17 to 1,060 students in 2021/22, which is a 26% growth rate over the period. This is somewhat below four of the other five faculties over the period, which had average growth of 40% over the same time frame;
- The presence of Okanagan College as the other post-secondary institution in the Okanagan region, which offers a Bachelor of Business Administration, as well as programming in arts, science, and health and technologies;

- The 77% increase in tenure/tenured track faculty, from 9 to 16 tenured/tenure track faculty from 2016/17 to 2021/22, and a decline of 25% in non-tenure track faculty. This is a more rapid growth in tenured/tenure track faculty than the other faculties at UBC-O. However, the absolute number of tenure/tenured track faculty significantly lags those of the other faculties, with the FoM tending to have roughly $\frac{1}{4}$ to $\frac{1}{3}$ the tenure/tenured track faculty of the other faculties, with the exception of the Faculty of Education which has roughly the same number of faculty, but far fewer students;
- For the 2021/22 year, the FoM has about 66 students per tenured and tenure track faculty member, which is nearly double the ratio of students to tenured and tenure track faculty of most of the other faculties. The ratio of students to non-tenured faculty also tends to be significantly higher than that of the other faculties;
- The FoM's Self-Study Report report notes concerns about the size of faculty and resulting implications for development and contribution to cross-campus initiatives and committees, as well as faculty well-being;
- This is the current Dean's last term, having served two 5 year terms. A search for a new Dean has commenced.

Themes and Highlights

Over our three-day visit, the review team was unpleasantly surprised on multiple occasions by what we heard from participants. In many sessions, it was clear that participants arrived well prepared to detail the issues they saw at the FoM. The tone of many meetings was one of frustration, with clear discontent from a variety of stakeholders. Participants were often angry about issues that had been previously raised in the 2017 External Review, but that had not been addressed over the last five years. We would strongly recommend greater engagement with the recommendations from that review and our own, which are often the same.

Chief concerns raised over the visit, relate to:

- *Strategic positioning.* What the faculty is about or how it defines and differentiates itself. In our discussions with stakeholders, it appears that UBC-O leadership, undergraduate students, some faculty and staff (including recruiters and student advisors), and the community believe the FoM is, for all intents and purposes, a business school. Yet, there is also the notion among some faculty and a few other stakeholders that FoM is distinct because it is about management rather than business. When the Dean was asked about

this distinction, he referred to a clear difference “in the literature” and noted the need in management to consider other types of organization such as government, not-for-profit organizations, health agencies, etc. The focus of the Faculty on socio-economic change was also raised many times as a differentiating issue.

Students and alumni, on the other hand, complained aggressively that they chose the FoM for a business education, but the program failed to deliver what they expected. Recruiters admitted they were unable to explain to prospective students what was distinct about the “management” positioning and advisors explained that they would often have to counsel students interested in human resources, finance, marketing and other core fields of business to look outside of UBC-O for training in these areas. This lack of alignment between how leadership and some faculty and staff see the Faculty and what students and much of the community expect is a fundamental challenge.

The exception to this dissatisfaction is the Masters of Management program, which we heard has a very high-touch and highly-engaged student-faculty relationship. Unfortunately, that program has only 8 students (4 of whom work for UBC-O) and seems unlikely to be viable in its current form. The students we talked to about the Program also seem to have chosen it more because of their ability to get a Master’s degree while still working, rather than because of the learning outcomes of the program. Faculty would very much like a research focused Masters, as well as a Ph.D. program, that would support their research activities and facilitate acquiring grants, which tend to require faculty being actively engaged in supervising and training students.

- *Leadership of the Faculty.* Students, faculty, senior leadership at UBC-O, internal UBC stakeholders, alumni and some community members commented on the lack of communication and strategic direction for the Faculty over a multi-year period in certain areas, particularly related to the Undergraduate Program. In one session with undergraduate students, a student commented that the FoM did not have a dean and was quite surprised to learn that, in fact, the Faculty did. This lack of presence and communication may be exacerbated by the Dean not having a permanent office in the FoM. Complaints ranged from an inability to introduce new programs and recruit faculty to inaccessibility and a lack of interest in feedback. A few participants felt they had been retaliated against for speaking out. However, stakeholders in some areas such as Co-op

and the Masters of Management program felt well supported by leadership. On the financial side, the review team heard that a historically stable financial position had been turned into a structural deficit.

- *Faculty size.* Another issue that is generating a great deal of discontent is the size of the research (tenure-track and tenured) faculty, which has been a challenge throughout FoM's history. This was seen as a major factor in the inability of FoM to recruit new faculty, offer a more compelling program for students, execute on new ideas, strengthen research, offer a graduate research program, build a reputation within the academy and community, or improve relationships with the community. The lack of growth in faculty was commonly attributed to difficulties in recruiting and retaining faculty, which in turn was linked to barriers to becoming effective researchers in the Faculty.
- *Research support.* The lack of research support is a major concern for faculty members. The FoM does not have critical mass in any area that allows it to attract new faculty to a particular research strength of focus. In addition, the faculty lacks graduate students, research seminars (a key means for faculty to stay abreast of new developments and build research networks), and strong mentorship for junior faculty members. The service demands on faculty were also cited as a significant barrier to research productivity.

The review team does not make these comments lightly and is aware that this review has a negative tone. However, given the feedback received over the three full days of consultation, we believe it is important to reflect the discontent and anger that we heard from a variety of stakeholders. While many of our recommendations repeat those from the 2017 External Review, which we believe are still relevant and important to the success of the Faculty, we have also included new recommendations that arise from our recent consultations. Key recommendations have been highlighted. We elaborate on these issues in the sections that follow.

Please note an asterisk “*” after the label of a highlighted recommendation indicates this same or a similar recommendation appeared in the 2017 External Review.

Undergraduate Education and Student Learning

The current Undergraduate Program was described to us and in the Self Study Report as being the cornerstone education offering of the FoM, and focused on: general management rather than business; socio-economic change; and interdisciplinarity. Both faculty and students expressed concerns with the Undergraduate Program, and we agree with the point made by one stakeholder that the undergraduate program has not received the time or attention it deserves.

The issue of being a Faculty of Management rather than a business school was brought up in many of our meetings, but many stakeholders struggled to articulate the implications of this difference to the curriculum of the Undergraduate Program. The Dean indicated he viewed management as encompassing more of the traditional soft management skills, as well as focusing more on organizations outside of business, such as not-for-profits, government agencies, municipalities, etc. The Dean and Associate Dean both noted this emphasis as stemming in part from the limited number of large businesses in the region, with many employers being either small businesses, not-for-profit organizations, or government funded agencies. However, with many students coming from outside the region and leaving the region for career opportunities, a primary focus on the needs of the region may be inappropriate.

In reviewing the curriculum, we felt it was very similar to what would be offered by a business school, so the implementation of the management emphasis in the undergraduate program was difficult to discern. We acknowledge that there may be differences internal to courses as a result of the emphasis on management. However, such differentiating factors should be more clearly expressed in course calendar descriptions, both to help communicate these to students and to ensure instructors are aware of such differences. Such changes seem like an important way the FoM can distinguish its offerings.

Faculty members seemed tired of the discussion regarding the “business versus management” distinction, and only a few comments were made on this point. However, some participants noted the division on this distinction has not gone away, and efforts to build consensus on this point have failed to date.

In our discussions and in the material provided to us, students expressed a clear preference for a degree in and focus on business disciplines. While management may be intended to be a differentiator for the FoM, it does not appear to be a desirable one from a student perspective. We note that many business schools at other institutions still encompass management knowledge and consideration of the different needs of many types of organizations, without sacrificing in-depth knowledge of core business disciplines.

We also heard from a number of stakeholders (students, the community, and faculty) that the Okanagan College business programs are more highly regarded than the FoM offerings, and the College's programs do offer majors. The data provided to us on high school transitions for the period 2016/17 to 2020/21 show more than twice as many high school students from the Okanagan region enroll in the Okanagan College Bachelor of Business Administration as compared to UBC-O's Bachelor of Management. This is a clear change from the previous External Review's findings. It is unclear to us why the FoM's reputation has weakened since the last review, but it is clear that the College is a strong local competitor.

The UBC-O recruiting team also noted challenges in differentiating a management program from a business program, and the unavoidable comparisons to what the Vancouver campus offers. A number of the students noted they had originally applied to the Vancouver campus, and were instead offered a place at UBC-O. They were then frustrated about the lack of majors available at UBC-O and the lack of depth in course offerings to develop their interests in the third and fourth years. Individuals involved in community partnerships also noted that students were in some cases not adequately equipped to participate effectively in community projects. As noted in the 2017 External Review, "...students seemed not to have been sold on the program but ended up in the program by default". These issues likely limit the FoM's potential for growth.

While it is not surprising that the FoM of UBC-O would have fewer majors than Sauder School in UBC-V given current student enrolments, students and alumni did expect some choice among disciplines to explore in depth. It was noted by review participants that while accounting courses were available as upper year electives, students interested in other areas (finance, marketing, HR, etc.) are not able to pursue these at an advanced level because of limited course choice. It was explained to us that the reduction in upper year courses was due first to the Faculty focusing on a smaller number of courses for online delivery during the pandemic. The significant

student frustration with the lack of upper year courses suggests that more offerings need to be added back in the near future.

Some other concerns noted by students included limitations in customizing their program because everyone has to take largely the same courses in first and second year; and that significant numbers of faculty teaching undergraduate courses "...were not management faculty..", presumably referring to faculty whose primary research interests and Ph.D. training were outside traditional business disciplines.

Finally, large class sizes in fourth year were noted by instructors and students, which is surprising for a relatively small Faculty. Typically in business programs, fourth year courses are smaller to engage in more synthesis and application of concepts to more challenging problems and opportunities. One instructor did note that instructors can ask for classes to be broken into smaller sizes if they prefer that. Given the comments made by students, this does not appear to be happening as often as students would like.

The FoM needs to clearly establish what students should expect from the Faculty and its programs. This includes a transparent description of what the Undergraduate Program provides, and how it is differentiated in ways that are attractive and discernable to students. A revised curriculum should include greater support for specialization in at least some disciplines (e.g., accounting, finance, marketing, tourism, entrepreneurship, human resources, etc.). Thought should be given to specializations that may help differentiate the Faculty from competing business schools while still being of interest to students. The specific majors should reflect, and evolve with, student and labour market demand. We note that it may be necessary to start with a small number of majors and then add to them as enrolments increase. It was noted that exit surveys have not been done for some time with graduates; it would make sense to resume these as soon as possible to help with the evolution of the program and its majors.

Recommendation 1*: The Faculty should immediately embark on a process to revise the curriculum of the undergraduate Bachelor of Management degree that both differentiates it and makes it attractive to students. This should include the creation of majors, and interdisciplinary themes aligned with the strategic direction of the school.

If the Faculty wishes to maintain an emphasis on management, the implications for courses and the program need to be clearly articulated and implemented in a way that goes beyond simply saying it is “not business”. For example, if the FoM wishes to more explicitly provide learning to help students understand non-business organizations or specific industries, or have a problem oriented/design thinking focus, integrative courses situated in the desired context that draw on a variety of disciplines could be offered. Possibilities could include courses where the context is start-ups, or health care, or environmental organizations, amongst others.

We feel there are other ways to differentiate the undergraduate program at UBC-O, some of which are already being pursued, such as the greater emphasis on experiential learning, capstone projects, or inclusion of curricular content that is reflective of local concerns but that also supports graduates in addressing global issues. Co-operative education is currently one of the strengths of the FoM, and has more opportunities than applications, suggesting more could be done in this area, though co-op staff felt more personnel would be needed.

Recommendation 2: The Faculty needs to further develop and define experiential learning opportunities for students as a differentiating dimension of the Undergraduate Program

As the FoM develops and refines its approaches to differentiation, it is important these be clearly communicated to all stakeholders, and appropriate print, website, and social media materials developed in conjunction with Recruiting to ensure they can explain the FoM’s strengths and respond to undergraduate applicant questions.

Recommendation 3: The Faculty should work with Recruiting to develop marketing materials that clearly distinguish the offerings of UBC-O from those of UBC-V and other business schools.

The FoM has been involved in efforts to improve access to programs for indigenous students, but it was also noted that there could be more outreach to youths in middle school and high school. We also note with concern the slow progress in indigenization, and would recommend that indigenous content be incorporated into the undergraduate curriculum as soon as possible. This might be done through inclusion of content in multiple courses throughout the curriculum and/or by adding an indigenous course to the existing curriculum. Consultation with local indigenous communities throughout any process to enhance the curriculum is important.

Recommendation 4*: The Faculty of Management should develop and implement both indigenous content to embed in the management curriculum, and further develop its strategy to recruit indigenous students.

Student Academic Experience and Support

As one of the stakeholders noted, to have a good undergraduate experience, students should feel connected to the University, program, and faculty, and feel safe and supported.

The FoM at present may not be achieving these goals for undergraduate students. Students in some cases did not feel a strong sense of community. Students felt their efforts to contact the Dean with concerns were not acknowledged, and that they had little voice in the design of the Undergraduate Program or the courses being offered. Students also noted faculty did not have the same campus availability post-COVID as pre-COVID. As a key stakeholder group, students should feel they have clear lines of communication with Faculty leadership, and that they play a role in shaping the FoM's direction.

Recommendation 5*: That the Dean meet regularly with the leadership of the Management Student Association.

Recommendation 6: That students have input into the mission, vision, and strategic initiatives of the FoM.

Students also expressed concerns about lack of responsiveness to questions about their programs, and the need to typically email to get responses to questions, which could take 3-5 business days during busy periods, rather than being able to discuss concerns directly with an advisor in person. UBC-O has a centralized advising model: it may be that refinements to central procedures need to take place so that students feel supported in a more timely fashion. This seems particularly important when the FoM does not have clear specializations, as students are likely to need more support in choosing courses appropriate to their interests.

Recommendation 7: That procedures and response times for student support from Advising be reviewed, and improved approaches to advising be considered.

The Student Learning Hub did not feel that management students were disproportionately represented in students needing help, and we did not hear any students expressing concerns about learning supports.

Extracurricular activities were also noted as an important feature of the undergraduate experience: alumni noted the tremendous value brought to their academic experience from participation in student clubs, case competitions, and experiential learning. Existing students also noted interest in these activities, which were in a number of cases suspended due to COVID.

We recommend that the Faculty resume these activities as soon as possible, and continue emphasizing co-curricular opportunities for students, as well as experiential learning as discussed previously. Alumni can be engaged to support both co-curricular and experiential initiatives, thus reducing some of the work for faculty and strengthening the connections to alumni.

Recommendation 8: That co-curricular activities be resumed as soon as possible

Graduate Education

Existing graduate programs in which the FoM participates are the UBC-O Interdisciplinary Graduate Studies Master and Ph.D. Programs, and two Master of Management (MM) course-based programs: the Dual Degree (combined undergraduate degree and Master of Management) and the Post-Experience Program, both administered and delivered through SE-Change. The MM Programs are described as focusing on “...organizational behavior, social change, community development, global context, and the empowerment of individuals”, and are intended to be interdisciplinary. Both MM Programs culminate in an applied project done in conjunction with an organization where students apply what they have learned throughout the MM Program.

The Dual-Degree MM is very new and is only beginning student recruitment, while the Post-Experience Program has been in existence since 2017, with 21 students in 2017/18, declining to 9 in 2021/22. A significant proportion of existing students appear to be employees of UBC-O. Students found the ability to do a graduate degree while continuing to work to be very attractive, and a key reason for enrolling in the program. The actual curriculum was not mentioned as a key factor in the decision to apply to the program decision making, though some students very much liked the emphasis on socio-economic factors, and the significant indigenous perspective incorporated into the MM was also noted.

Students in the MM felt extremely well supported by the staff, and noted the Dean and faculty were very involved in the Program. Students noted that faculty would change courses to support student interests, and routinely asked students for input on the courses and program. Student satisfaction with the MM was a significant contrast with what we heard from undergraduate students about the B.Mgt.

A key challenge noted by faculty was the lack of graduate students with whom to work on research projects. Involving and training graduate students is a key consideration in the awarding of many research grants, and good graduate students can be a significant boost to faculty research productivity. It does not appear that the existing MM Programs will provide graduate students with the skills required to support publishable research in good quality journals, given the light emphasis on research methods and scholarly knowledge of a particular management discipline in the Programs. However, the existing Programs could be helpful in enabling faculty to engage in applied research projects with graduate students.

While the MM Programs are very new, and enrolments in the Post-Experience MM have likely been affected by COVID, we are also concerned that the low enrolments may stem from lack of consideration of market demand for particular skills and knowledge. While the Self-Study Report notes the consultation within UBC-O to design the Master of Management, there is little about consultation with the wider communities or consideration of labor market data to help guide the curriculum. The web page for the Dual Degree MM does not outline which careers students are equipped for upon graduation. In contrast, the UBC-V equivalent program provides students with business and management knowledge, and the contributions to career success are more

obvious. There may also be a need for more focused recruiting for graduate programs, which is a different market than for undergraduate programs.

The MM Programs may thus be at risk of neither providing the revenue to support graduate programming with a research focus, nor providing the research focus themselves to provide graduate students with the research abilities to support faculty research. Careful review of the curriculum of these programs, and consideration of a small research focused Master's program could thus be useful. It was noted that the FoM is the only Faculty at UBC-O without a research focused graduate program. However, we also note the concern raised by the previous external reviewers that the launch of a Master's program could be premature, and it does appear that the MM program may well have diverted attention and leadership that was badly needed for the Undergraduate Program to flourish.

Recommendation 9: The Faculty develop a research-focused graduate program, such as an MSc program, in addition to the current professionally-focused MM Programs. The MM curriculum should be reviewed to ensure it is addressing market demands, and recruiting efforts should be reviewed to ensure they are appropriate for graduate programs.

While the Interdisciplinary Graduate Studies Program (IGS) is research focused, some faculty as well as Deans of other Faculties noted that the themes for the IGS Program did not sufficiently encompass management or business research, which has limited the involvement of FoM faculty in supervision. These themes are: Digital Arts & Humanities; Community Engagement, Change, and Equity; Global Studies; Power, Conflict, and Ideas; Sustainability; and Urban and Regional Studies. The addition of one or more themes that considers interactions, influence, and information exchanges among people in groups, organizations, markets, and/or economies might be very helpful in providing more scope for interdisciplinary work related to business and management, and improve FoM faculty member interest in participating in supervising students. Review of the IDG themes could be part of a larger discussion of collaboration among faculties in graduate student programming and how to better support interdisciplinarity.

Recommendation 10: That the interdisciplinary graduate themes be revisited by UBC-O to develop greater scope for graduate students doing management research.

Research, Scholarly and Professional Activity

The Report notes the FoM has 13 tenure-stream faculty members with active research programs, spread across a variety of research areas, though with little or no presence in research in some traditional disciplines, such as accounting, finance, or human resources. The Self Study Report notes success in joint research chairs shared with other units across campus and, in particular, in being awarded a Canada Research Chair in Applied Health Economics. These are laudable and important to building the research culture.

Grants for research funding have been about \$200,000 a year, increasing recently to \$1,000,000, with much of this increase stemming from the recent awarding of the Canada Research Chair. The Faculty has also significantly increased the number of research grant applications submitted, and has had respectable increases in overall grant dollars received. The contributions of the staff member responsible for grants facilitation was noted as a very positive factor in this increase, and it is unfortunate that the individual is leaving UBC-O.

Lack of research support was a major concern of tenure-track faculty in particular, and was viewed as a major impediment to hiring and retention of faculty. Two main issues were raised as contributing to the lack of research support: the lack of colleagues in the same or similar disciplines, and the lack of graduate students. The lack of colleagues significantly affects faculty recruitment, retention, and research productivity. It is usually very difficult for any research focused Business or Management Faculty to keep faculty in a discipline where there are not some colleagues to work with on research, including the presence of more senior colleagues for tenure-track faculty. The FoM has tried to compensate for this lack of depth in any one area with a focus on multidisciplinary, and we are impressed by the success of some faculty in pursuing this path. However, we also note that multidisciplinary research can be harder to publish in top-rated journals, which can also affect faculty morale and retention.

We view multidisciplinary as a supplement rather than a substitute to having research strength in at least some business/management disciplines. There needs to be regular contributions to mainstream business research journals if the FoM is to raise its profile among other business and management schools. Having research depth in at least a few business disciplines would also aid the FoM in contributing effectively to multi-disciplinary teams that require such knowledge. The Self-Study Reports notes that as a discipline, management is "...critical to the

strategic agenda of the campus...”, but the FoM’s ability to support that agenda is limited by the current number of researchers in management and business disciplines. Other Faculties also noted the lack of clarity around the FoM’s mission affected their ability to pursue inter-faculty research partnerships.

Recommendation 11*: That the Faculty of Management focus hiring of tenured and tenure-track faculty to improve depth in at least some business and management research areas.

While not explicitly mentioned by most faculty, we also note the issue in the last external review concerning lack of research seminars, which are a key means for faculty to stay abreast of research developments and build research networks. This is likely still needed to help further build the research culture at UBC-O, but may be challenging to implement given the workload in managing such a series. UBC-O could explore being able to attend research seminars at the Vancouver campus virtually. Having visiting scholars in residence to help mentor junior faculty members and strengthen their research networks could also be helpful.

Recommendation 12*: That the Faculty of Management institute a seminar series inviting top scholars to present their work at UBC Okanagan.

Recommendation 13*: 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.

Similar to the last review, we would recommend further efforts in developing fellowships, professorships, or chairs in business disciplines. Such positions would be helpful and important in attracting and retaining faculty to strengthen the Faculty’s research depth, and also support undergraduate and graduate programming.

Recommendation 14*: The Faculty of Management should continue efforts to attract funding for fellowships, professorships, and chairs in business and management disciplines.

We have already discussed issues related to graduate students and research support in the previous section. However, it is worth noting that the challenge of getting graduate students is serious enough that faculty members have had to not only become associate members of other UBC-O faculties to have access to graduate students, but are working with other Universities to obtain sufficient students. The lack of graduate students in the FoM also limits the availability of teaching assistants for faculty, adding to instructors' workload. While some faculty are keen to start a Ph.D. program to provide students to train to facilitate acquisition of research grants, we feel that in the short-term this would create an additional burden on a Faculty that is already thinly stretched. The FoM also does not yet have a sufficiently strong reputation that would allow it to easily attract top students or place graduates into academic positions.

We also suggest the FoM provide more funding to post-doctoral fellows to improve research support for faculty. It could also be that post-doctoral fellows might be an attractive source of applicants for tenure-track appointments.

Recommendation 15*: The Faculty of Management should consider providing more funding for post-doctoral positions to improve the research productivity of existing faculty and as a possible source of applicants for tenure-track positions.

Leadership and Administration

Perceptions of faculty leadership and administration were mixed, with FoM non-academic staff, the Co-op Education Program, Student Services, and students in the graduate program being quite positive about leadership, and academic faculty and undergraduate students raising a number of concerns. Our sense was that the Dean had prioritized some FoM initiatives such as the Master of Management and the Co-op Program, but was not involved in others, such as the Undergraduate Program and fundraising activities.

The perceived lack of decanal involvement in the Undergraduate Program is concerning, given the number of students and apparent undergraduate student dissatisfaction. While space is at a premium for the Faculty and UBC-O more generally, it is problematic that senior leaders within the Faculty are not regularly on campus and available to students and staff. Exacerbating the

lack of physical presence, slow and infrequent communication from the Dean's office appears to be a persistent concern.

The Associate Dean noted much of his time was focused on the STAR initiative. Given the challenges in the Undergraduate Program and in research, we would suggest both the Dean and Associate Dean need to be focused on Faculty development, which may also help reduce the demands on other faculty members.

Recommendation 16*: Given the current state of the Faculty of Management, the positions of the Dean and Associate 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.

The lack of a strategic plan was highlighted in the previous review. We note that a vision statement has now been developed; however, we see a strong need to bring together all stakeholders to develop a mission and strategic priorities. Plan contents and development should include:

- A clear means of differentiating the FoM in ways perceived as valuable by students, staff, and employers;
- A strategy to grow the FoM academic staff complement to improve the research culture.;
- Widespread and meaningful consultation with relevant stakeholders;
- An outside facilitator to oversee the process and develop an initial draft; and
- Broad communication and the basis for action and attention by FoM leadership.

Recommendation 17*: The next Dean of the Faculty of Management should lead the development of a five-year strategic plan outlining a mission and values for the Faculty, as well as clear strategic priorities. Development of the plan should involve significant and meaningful consultation with all stakeholders.

The FoM also maintains collegial governance, both through internal bodies such as Faculty Council, and through their participation in UBC-O governance committees. These responsibilities and other committee work are an important faculty member responsibility.

Faculty members and the Self-Study Report noted such service demands were onerous, particularly for the workload associated with faculty searches. Faculty and staff felt there was often disagreement over candidates, and expressed concern about numerous failed searches, a finding echoed in the last external review. However, the data provided by the FoM for the most recent six year period notes eight successful recruiting efforts, and just two failures. We can not explain the discrepancy between multiple comments made to us about frequent failed searches, and the data provided. Efficacy of recruiting might be improved by having a strong chair of the search committee to guide discussion, and clarity around evaluation parameters and priorities in hiring, as well as better understanding of how each hire supports the FoM's strategic plan.

People, Environment and Culture

In our meetings, both academic and non-academic staff provided a number of thoughts about the FoM culture and environment . As with every other organization, the Covid pandemic has clearly played a role in contributing to feelings of isolation and disruption, but other factors also seemed to be at play. Academic and non-academic staff also seemed to feel differently about the current environment in the FoM.

It is difficult to draw many conclusions about faculty members' perceptions about support and challenges with the Faculty environment solely from the Workplace Experiences Survey done, given the low response rate. However, the faculty who met with us echoed concerns noted in that report about communication, inclusion, support, and respect. While it does appear that morale has improved since the 2017 External Review, there is general agreement that the workload pressure on faculty contributes to morale problems. A number of faculty also noted concerns about reprisals for speaking out or providing criticisms, which is disquieting to hear. There was a sense among some faculty that their efforts in service were not acknowledged or appreciated by Faculty leadership, and more broadly that they were not supported, particularly with respect to their efforts towards tenure. More structured support from FoM leadership and senior faculty could be needed to help tenure-track faculty progress in their career and feel more confident about their progress towards tenure.

The challenges in being awarded tenure and promotion are often the biggest sources of stress for tenure-track faculty, and uncertainty about what is required to achieve tenure can only make the situation worse. What we heard about tenure expectations varied significantly across our

meetings: some stakeholders said they were the same as UBC-V, but that Deans needed to put in significant time to “sell” faculty seeking tenure and promotion to the relevant committee; some stakeholders said that requirements were adjusted for the different circumstances faculty have at UBC-O, and that these adjustments might be overly generous; and some academic staff simply didn’t know, but were worried they would be held to the same standards as UBC-V. There seemed to be a sense that quality expectations of research were somewhat lower, though strong levels of research productivity would still be expected. We note that six of eight faculty seeking tenure since 2017 received it, which suggests the requirements are achievable.

Great clarity around tenure and promotion requirements should also help in recruiting, as questions about tenure expectations almost always arise in the hiring of tenure-track faculty.

Recommendation 18: Requirements for tenure and promotion for tenure-track faculty be clarified and regularly communicated to tenure-track faculty as well as applicants to tenure-track positions. A mentoring program for junior faculty should also be implemented.

Covid has also adversely affected some previous practices. Some academic staff noted that activities such as meetings to discuss and plan the undergraduate program no longer occur. Similarly, group activities and events have declined—such as social activities associated with meeting new faculty. This may not be surprising given faculty perceptions of a heavy workload, which can lead to activities seen as “nonessential” being neglected. We feel any initiatives that help increase the presence of faculty and staff on campus and improve collegiality would be helpful for morale and improve communication. Several faculty noted they felt faculty generally still had a passion for teaching and would be willing to help to build the Faculty, which is encouraging.

Recommendation 19: The Faculty should make an effort to re-engage members of the faculty and staff through regular meetings and activities to improve a sense of camaraderie amongst colleagues and improve communications.

Limited-term appointment faculty were puzzled why they were on annual contracts when they had taught for the FoM for many years. The lack of commitment from the FoM and uncertain job

security is demotivating and impedes the ongoing development of the courses they taught. The review team was also told that contracts were often provided late, which limited the time available to prepare a course, and further contributed to feelings of uncertainty and lack of inclusion.

Having limited-term appointment faculty committed to and rewarded for ongoing improvement in the courses they teach is important to student satisfaction, as well as reducing stress on instructors. Creating longer term contracts might also enable the FoM to assign service responsibilities to limited-term appointment faculty and reduce the load on tenure-track and tenured faculty for supporting extra-curricular initiatives that are important to students and that help differentiate the FoM.

Recommendation 20: The Faculty should give limited-term instructors, with evidence of good teaching, multi-year contracts.

In contrast with faculty, non-academic staff generally seemed positive about the support they received, though concerns about communication were noted in the Workplace Experiences Survey, and in some of the interviews.

In our meetings and in the Self-Study Report, the issue of the small size of the Faculty in terms of academic staff was raised a number of times by various stakeholders—usually in the context of having negative effects on service (taking too much time) and on research (too little time available). It was also noted as a factor negatively affecting retention, as usually a critical mass of tenure-track and tenured faculty is needed to support curriculum development and facilitate research. It is difficult to provide any norms as to what the size of the Faculty's academic staff should be. However, it is clear that the ratio of tenured/tenure-track faculty to students is lagging well behind that of the other faculties at UBC-O. We can not think of any particular reason why the ratio of students to faculty should be higher for a faculty of management or business school relative to other disciplines, and our own experience suggests that the FoM is at the upper bound for such ranges, particularly for a research-intensive institution such as UBC.

Significant support from senior administration would be needed to rapidly improve the number of tenured and tenure track faculty, but we feel that moving quickly to build critical mass in a few

areas would greatly improve the FoM's programs and research profile. A coordinated effort should be made for multiple positions to be advertised at one time (i.e., cluster hiring) in specific disciplines. Incoming new faculty members should be provided with significant start-up research funds (from internal resources if necessary) to facilitate hiring. We appreciate the significant load placed on faculty from recruitment efforts, and suggest that faculty that are significantly involved in hiring could be given course releases to enable adequate time to be devoted to this task. Another possibility is the incorporation of faculty members from other academic units on search committees.

We also note the importance in hiring of alignment between the majors the FoM chooses to develop, and the research interests of existing and future faculty. Faculty depend on research to stay current in their fields and share that knowledge with students, in the same way that instructors need ongoing experience in their disciplines to share current knowledge with students. Such alignment is particularly important if the FoM decides to pursue accreditation in the near future.

Recommendation 21*: The Faculty should consider a strategic hiring campaign to address the faculty shortage at all ranks of faculty.

There was little mention of relationships with the Sauder School of Business, though numerous comparative references to it in our meetings. However, it would seem worthwhile to explore whether some relationships could again be developed, such as the previously mentioned inviting of FoM faculty to Sauder research seminars, or by having individual Sauder faculty spend 1-2 week periods at UBC-O to foster research and provide guidance to tenure track faculty on research and teaching. Short study leaves for UBC-O faculty at Sauder might also be beneficial in forging connections and providing additional mentoring for junior faculty. These types of activities could contribute to faculty feeling like part of a larger community and in forging larger networks.

Recommendation 22: The Faculty should explore opportunities to connect with UBC-V Sauder School of Business.

We heard a number of concerns about the increase in non-academic staff in the Faculty, which were also noted in the previous External Review. The appropriate level of non-academic staff is difficult to assess. The roles that are appropriate to have within the FoM are also difficult to determine. We would recommend a review of the level of non-academic staff, as well as the roles of those staff relative to what is needed to support the FoM's mission and the appropriateness of academic versus non-academic staff for each role. With increased support centrally in UBC-O for fundraising and community engagement, some activities the FoM is currently undertaking on its own may be less needed. A review of non-academic staff levels and their roles and coordination with UBC-O central units is particularly important as the number of non-academic staff has significant budget implications.

Recommendation 23: The Faculty needs to review non-academic staff levels and roles, and their coordination with UBC-O central units.

As noted in the discussion of the Undergraduate Program, we saw limited consideration for the recommendations of the Truth and Reconciliation Commission in the discussions of research, teaching, or service, though the Self-Study Report notes efforts that have been made to improve co-op education accessibility for indigenous students, as well as other initiatives including collaborations with the Okanagan Nation Alliance, and workshops with the indigenous artist Csetkwe Fourtier. In addition to considering revisions to the Undergraduate program, we encourage the FoM to give thought to other ways in which the FoM can support indigenous aspirations and the recommendations of the TRC in research and in service, in consultation with the local indigenous communities.

Recommendation 24: The FoM needs to more clearly and intentionally respond to the Truth and Reconciliation Commission its teaching, research and recruiting activities.

Community Engagement

Community members were fairly supportive of the FoM and its involvement in the community, based on comments made and the results of the survey of community members. The FoM has a number of experiential student projects involving community organizations that seemed to be

well regarded, though it was noted graduate projects could be longer and more in-depth, and thus more likely to provide higher quality outcomes. Alumni also felt there were more opportunities to engage with them to support students in projects, or in other roles.

Community members saw opportunities for the FoM to provide leadership in areas such as sustainability, ESG initiatives, the circular economy, not-for-profit organizations, and the changing social environment. The individuals we spoke with both felt the FoM and Okanagan College provided strong graduates. Some interest was expressed in certificates to help with staff development in the community.

Community members also noted an interest in more interaction with faculty, to work on problems and opportunities of mutual interest. There was a sense that faculty were more inclined to wait for the community to reach out to them, rather than faculty being proactive in such engagement. The Faculty leadership would benefit from establishing a stronger presence in the community through attending business-related events, engaging with business leaders in both formal and informal settings, and inviting businesses to the campus. These efforts would help to increase community and regional awareness of the FoM activities while facilitating greater communication between the faculty members and community.

Staff involved in community engagement for the FoM noted that with the many changes going on, keeping communications clear was a challenge, though UBC-O had developed a lot more capability in this area in recent years. Other personnel involved in community partnerships noted the lack of clear disciplines in the FoM created challenges in meeting the labor requirements of the region, particularly with respect to supporting entrepreneurship.

The wine sector was noted as providing a strong opportunity for greater engagement with the community, ideally based around a strategy and ongoing events and initiatives.

Recommendation 25*: The next Dean of the Faculty should create an external advisory council with community members and alumni to build and enhance relationships with key community stakeholders, as well as provide a channel of communication and support for the Faculty within the broader community.

Support for the University's and Campus Strategic Plans

The FoM has clearly placed significant emphasis on several aspects of the UBC-O Aspire plan, including experiential learning and interdisciplinarity in teaching and research. We have already commented on these dimensions in previous sections. However, the SE-Change initiative is worthy of separate discussion.

The Self-Study Report positions SE-Change as a major initiative supporting key education and research activities, not just for the FoM, but also for UBC-O and the local community. We note support of interdisciplinarity as a key part of its mandate. However, SE-Change does not seem to be well understood by many of the FoM stakeholders. A number of concerns were expressed about its current governance, administrative structure and responsibilities. We heard varying reports of the success of the first SE-Change Festival, and concerns about its promotion. Given the positioning of the Master of Management programs being run out of SE-Change, such confusion may be very detrimental to student recruitment. It was also noted that SE-Change has taken significant financial resources, but has not yet provided much revenue.

Recommendation 26: SE-Change requires an immediate full UBC-O governance review to ensure that it is meeting the needs of students, faculty and other stakeholders, and that it is correctly structured within UBC-O's existing governance structures.

Physical and Other Infrastructure and Resources

There are several aspects of the resources available to the FoM that require comment: physical space; resources for recruiting faculty; budget; and fundraising.

First, the space available for FoM faculty and staff offices is extremely limited, with many individuals sharing office space and some individuals apparently having office space in other buildings across campus. Classroom space is also apparently at a premium, and not always of the appropriate size for particular course enrolments. It was noted previously that the Dean had

given up his office, and worked in boardrooms when on campus. However, this may also exacerbate the accessibility challenge identified by students, staff and faculty of finding the Dean.

We understand from senior administration that space shortages are a widespread problem across the UBC-O campus, with additional space under construction. However, a side effect of these cramped conditions may be the tendency of faculty and staff to work from home (the Self-Study Report notes many staff are interested in remote work arrangements). Nonetheless, any tendency of faculty and staff to routinely work from home can contribute to feelings of isolation and communication challenges, as well as students feeling unsupported.

The lack of space will also constrain enrolment, but given construction is already underway, it is possible that additional classrooms will be available by the time the FoM develops its strategy and aligns its programming with the strategy. As senior administration seems well aware of the space problems, no recommendation seems needed beyond those made in earlier sections of this report.

The need for additional tenure-track and tenured faculty will require significant investments by UBC-O, but we see no alternative to being able to successfully develop the FoM programs and strengthen its research profile, except through additional faculty who can guide and create the necessary programming and work together to improve research productivity and quality. These additions are also important to reduce the stress on existing faculty. It was noted that some funds are available to faculties to start new programs; we would recommend these funds also be made available to support significant changes to the Undergraduate Program should the Faculty choose to pursue such changes. Creativity in dealing with the challenges of renting accommodations in the Kelowna area or supporting buying homes may also be important in helping potential faculty choose UBC-O, given the current challenges of the housing market.

Recommendation 27: That Senior Administration provide financial support to support strategic hiring of tenure-track and tenured faculty for the FoM.

Revenue will obviously be key to helping support the FoM's development. A strategic plan that ensures programming reflects the needs of all stakeholders and clear differentiation of the

FoM's offerings in recruiting materials should help to increase student enrolments, which will in turn offset part of the costs of additional faculty. This differentiation will also help offset the risk that the FoM will lose students if Sauder increases enrolment, given a significant proportion of FoM students come to the Faculty because they did not get into Sauder.

While the FoM has traditionally had a structural surplus, with the addition of more non-academic staff and other factors, this is no longer the case, and the Faculty is now facing a structural deficit. This deficit is likely to continue if the Faculty does not have some success in some of its new programs. It was also noted by other Faculties that the FoM is not contributing financially to the Interdisciplinary Graduate Studies program. If more appropriate themes are added to this program such that the FoM is more engaged, financial contributions will likely be needed.

Fundraising is another important revenue source for most business schools, but is not currently working well in raising funds for the FoM. UBC-O staff involved in fundraising felt they had little or no involvement of the Dean or other FoM faculty members, and noted the series of leadership changes had affected building a network of donors. The challenges in explaining the key initiatives of the FoM and its distinctive features such as its emphasis on socio-economic impact have also affected fundraising. There was a perception that the FoM wants to handle their own relationships with the community, rather than work with Advancement. We note that the FoM staff member involved in Community Relations indicated that traditionally the Faculty had to do much of their own fundraising prior to a stronger presence of the central group in UBC-O. It was also indicated that there is not a community relations strategy across campus, which could lead to more gaps and miscommunications.

The amounts being raised each year by Advancement for the FoM were very small relative to what is being raised for the rest of UBC-O (approximately \$25,000-\$50,000 out of \$9 million a year raised for UBC-O as a whole), or the typical amounts raised for business schools. Advancement did feel there were other opportunities that could be explored if communications could be improved with the FoM, and if the FoM participated more in external-facing events.

Recommendation 28: The next Dean of the Faculty should work with Alumni and Advancement to help source additional funds which could support students and research.

Future Development

Probably the biggest barriers to the FoM's future development are the lack of tenure and tenure track faculty, and the misalignment between what the undergraduate students want, and the Faculty's undergraduate offerings. The Review Team does not feel that the FoM's desire for multi-disciplinarity and community involvement requires abandoning business disciplines and related programming. The Faculty would likely be in a better position to contribute to multidisciplinary research through a management and business lens on research, as well as by having a curriculum with more depth in core business disciplines.

We feel the attempt to distinguish "management" from "business" has been more of a hindrance than an aid to the Faculty's development, and that the current curriculum and research of the Faculty could equally well be coming from a School of Business as from a Faculty of Management. The FoM should not be concerned about "competing" as a business school and should pivot away from a dogmatic "management" focus to build strength in strategically selected business and management disciplines. Ideally, this would open the door to leveraging UBC's national and international brand recognition and network, which would in turn allow students to participate in experiential learning, co-op employment, and applied research opportunities not available at other institutions.

Even with a pivot towards business curricula, the FoM can support an understanding of non-business organizations, as well as related experiential opportunities, and perhaps be more intentional in how this is achieved.

We feel significant opportunities exist for UBC-O to be distinctive through its choice of disciplines, its emphasis on experiential learning, and through opportunities for multidisciplinary embodied in courses and research that more clearly incorporate business knowledge to a larger team or problem.

The choice of what business disciplines to offer should be based on significant consultation with the community and students, as well as analysis of market demand and consideration of the distinctive features of the Okanagan that reflect larger societal needs. Faculty leadership then needs to focus significant effort on hiring faculty at all levels and across the core disciplines, as

well as supporting existing faculty in their research and teaching to help develop the FoM's culture and morale.

As the Faculty grows, the need for additional space for teaching, learning, research and community-engagement activities will become even more acute. As construction is already underway, this need will presumably be addressed in the next few years.