



FACULTY OF MANAGEMENT

Terms of Reference of the Review Team

Purpose of the Review

The broad goal of the review 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.

Background Material

- The University's goals and objectives as outlined in its [Next Century Strategic Plan](#), the Okanagan [Outlook 2040 and ASPIRE](#) process
- The Faculty of Management Self-Study

Terms of reference

Without limiting its overall mandate, the Review Team 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.
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.



4. **Research, Scholarly and Professional Activity:** To review and evaluate the quality, extent, range, and balance of the scholarly activities of the Faculty and in its involvement in research institutes/centres/labs. The reviewers should consider the achievement and status of scholars and practitioners within the Faculty, their leadership within their communities-of-praxis, their granting/funding success, and the quality and quantity of their performance in relation to the achievements of their counterparts in comparable Faculties of Management nationally and internationally.
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. The review should take into account support for career advancement, professional development, advising, and balanced workloads and give special attention to the Faculty's performance relative to the University's employment and education equity policies.
7. **Community Engagement:** To assess the nature, scope, and effectiveness of the Faculty's outreach activities through its educational and research programs, and with its external community including schools, Indigenous communities or professional organizations, UBC alumni, government agencies, 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 the Strategic Plan and [ASPIRE](#), notably UBC's commitments [to People and Places](#), [Research Excellence](#), [Transformative Learning](#), and [Local and Global Engagement](#).
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.



THE UNIVERSITY OF BRITISH COLUMBIA

Okanagan Campus

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

This study, and its accompanying Appendices, have been prepared by the Dean's office of the Faculty of Management. It is part of a Faculty self-study, and is written as a "taking stock" in a period of transition, the last year of office for a Dean who has served two 5-year terms, plus an extra year at the invitation of the Provost and Vice-Principal Academic. The aim is to offer a perspective on the Faculty's activities and organisation, where they have come from and where they are now, and to comment on some of the challenges and opportunities going forward. Detail is provided through the presentation of data, and of documentation that has been developed over the life of the Faculty.

Further detail is offered in the accompanying Appendices. All faculty and staff on the Faculty of Management Council, and the student representative on Council, were invited to send feedback on an earlier draft. That feedback has been incorporated into this final version.

We envisage that the Faculty self-study will be completed by a report of inputs from students, faculty, and staff using data that is being purposely collected by UBC's Planning and Institutional Research Office (OPAIR), according to the review terms of reference. Once available, that data will be presented by the Dean's office as fully and accessibly as possible, without filters.

OVERVIEW

Aimed at impacting socio-economic development of the Okanagan and the British Columbia Interior, UBC's Faculty of Management (<https://management.ok.ubc.ca>) and its Bachelor of Management program were formally established on 1st July, 2005.¹

The Faculty experienced rapid growth, from a student headcount of less than 200 in 2005 to approximately 800 by 2014, and today over 1,000. A single faculty member and no staff in 2005, rose by 2014 to 15 tenure stream faculty (by headcount), 11 non-tenure stream faculty, and 7 staff. Today, there are 14 tenure stream faculty (by headcount),² 15 non-tenure stream faculty, 17 staff on the Faculty payroll, and 6 staff working in the Interdisciplinary Co-Op Education program that are funded by the Provost and Vice-Principal Academic.

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 three 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.

Vision

One of the objectives in appointing the Dean in October 2012 was to bring stability, and to develop for management a vision that we could aspire to, reflecting the aspirations of the Okanagan campus, and

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 We currently have job offers out to two tenure stream assistant professors.

UBC as a whole. We did that, and have been using the vision as a starting point and inspiration for developing our activities and organization over the last 5 years.

Faculty 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

The Faculty is small and rapidly evolving, and over recent years we have strived to build 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.

Research, and programs

The Faculty's research sits at the nexus of the three main themes that emerged from *Aspire: Envisioning Our Future*, the 2014 strategic planning document for UBC's Okanagan campus. We embody both experiential and collaborative research, and we seek regional and global impact. We have been increasingly successful in earning research funding, which hovered around \$200,000 per annum in each of the years 2013 to 2016, and reached over \$1 million in 2020. With our strong focus on interdisciplinarity, the Faculty has also taken a leadership role in enabling research opportunities across campus - for example, with the development and leadership of the Survive and Thrive Applied Research Initiative (UBC STAR, <https://star.ubc.ca>),³ and with the emergence of the Social and Economic Change Laboratory (SE-Change) (<https://sechangelab.ubc.ca>).

The cornerstone educational offering of the Faculty is our Bachelor of Management (BMgt), a general management program that is structured around business functions, draws upon experiences with such programs in North America, and looks to educational opportunities arising from our location in the Okanagan. A significant number of BMgt students also participate in the Interdisciplinary Co-op Education program, a cross-Faculty initiative established and developed through academic and administrative leadership from the Faculty of Management, and also looking to educational opportunities arising from our Okanagan location. Interdisciplinary Co-op Education is operated through SE-Change, an initiative of faculty and staff from across UBC Faculties and campuses that is administered by the Faculty of Management.

Our involvement in graduate programs focuses on Interdisciplinary Graduate Studies Master and PhD programs, research-based degrees administered by the College of Graduate Studies; and on two Master of Management (MM) programs, one a very recently introduced dual degree and the other a post-experience program, both course-based graduate degrees that share the same curriculum, and both administered and delivered through SE-Change.

³ Keith Culver, the Faculty of Management Associate Dean, Regional Innovation Practice, is Director of STAR. The initiative was initially developed by a working group led by Dean Roger Sugden.

Opportunities, recent achievements, and priorities

In our December 2019 campus budget and planning submission, immediately before the COVID-19 pandemic, we identified our opportunities, strengths, weaknesses and threats, and our priorities for the initial part of the coming 5-year planning period:

<u>Strengths</u>	<u>Weaknesses</u>
<ul style="list-style-type: none"> • Focus on ‘management’ in diverse and varied organizations in non-metro regions. • Role in cross-campus research and teaching initiatives. • Engagement of regional communities and international partners. 	<ul style="list-style-type: none"> • Faculty size. • Faculty communication, internally and across UBC. • Faculty composition that skews requirements around faculty roles.
<u>Opportunities</u>	<u>Threats</u>
<ul style="list-style-type: none"> • To develop ‘management’ as a cross-cutting subject area for the campus. • To deliver research that impacts communities in practice. • To pilot innovative learning programs. 	<ul style="list-style-type: none"> • Thin market for new faculty for a non-metropolitan campus. • Expectation to operate as a large Faculty, immediately. • Incentives to pull back from a cross-cutting agenda.

<u>Priorities, 2019 – 2024 Planning Round</u>
<p><i>Recruit faculty</i></p> <p>Contributing to and coordinating cross-cutting research and programming; adding expertise in core management subjects.</p> <p><i>Introduce the dual degree MM</i></p> <p>A cross-campus program that focuses on organizational behaviour, social change, community development, global context, and the empowerment of individuals; and delivered through SE-Change.</p> <p><i>Contribute to establishment of SE-CHANGE</i></p> <p>An initiative of faculty and staff across UBC campuses and Faculties. The vision of SE-Change is to provide space and resource for faculty from across UBC campuses to be innovative in research, programming and associated public engagement in the interdisciplinary study of social and economic change, including an approach to the field of management that is rooted in multiple disciplines and subjects in faculties across the university.</p>

Since March 2020 we have been especially concentrated on delivering our programs in the context of the COVID-19 pandemic, with the health and wellbeing of all students, faculty and staff uppermost in mind. We prioritised access to the Bachelor of Management for all students, whether they were based in the Okanagan, Canada, or internationally. Whilst being committed in the longer-run to the Bachelor of Management as an essentially on-campus program, throughout the pandemic we aimed to provide as much clarity as early as possible to all students, faculty and staff about which courses would be offered, and how they would be delivered – online, on-campus, or hybrid. An objective, insofar as possible, was to enable each person to make their own decisions about what they would do, and how they would organise their activities and commitments, based upon their particular circumstances, and the continuing uncertainties due to the pandemic.

We have nonetheless continued to pursue other longer-running priorities for the development of the Faculty, and the management subject matter as a cross-campus concern. In our most recent campus budget and planning submission, in December 2021, we reported key achievements:

<u>Recent Achievements</u>
<ul style="list-style-type: none"> ✓ Playing a <i>lead role</i> developing <i>SE-Change</i>. ✓ Introducing the <i>dual degree Master of Management</i>, to be operated through SE-Change. ✓ Securing over \$1 million research funding in 2020/2021, our <i>first Canada Research Chair (CRC)</i>, our <i>first Principal's Research Chair (PRC)</i>,⁴ our <i>first campus Researcher of the Year</i>,⁵ and our <i>first faculty member funded by two tri-agencies</i>.⁶ ✓ In 2022 we <i>increased our research funding</i>, and secured our <i>second campus Researcher of the Year</i>.⁷ ✓ Taking a lead role in turning the <i>Wine Research Centre</i>, previously an initiative of the Faculty of Land and Food Systems (in Vancouver), into a dual campus initiative, 'headquartered' in the Okanagan, and operated through SE-Change under the sponsorship of Land and Food Systems, the Irving K Barber Faculty of Science, and the Faculty of Management. ✓ Introducing a <i>minor in Management</i> for non-Bachelor of Management undergraduates.

Our priorities were also laid out in the 2021 campus budget and planning submission, reflecting our ongoing commitment to contribute fully to advancing UBC's strategic plan:

⁴ Eric Li.

⁵ Eric Li, Researcher of the Year in Social Sciences and Humanities.

⁶ Jen Davis.

⁷ Jen Davis, Researcher of the Year in Health.

Priorities, 2021 – 2026 Planning Round

Recruit faculty ⁺

Contributing to and coordinating cross-cutting research and programming; adding expertise in core management subjects.

Indigenous Reconciliation (ISP/TRC implementation)

Developing a long-run plan for meaningful faculty recruitment, and in that context focusing on supply side action.

Continuing cross-campus conversations re a Bachelor of Sustainability concentration in Sylix land management, as part of the SE-Change initiative.

Climate Action and Sustainability

Exploring possibilities for contributing to the Bachelor of Sustainability.

Operational Excellence

Developing ways of operating that cross institutional boundaries.

Developing a budget for a ‘stand-alone’ SE-Change.

Developing SE-Change as an academic unit related to all faculties, controlled by no one Faculty. Without challenging the specific agendas that individual Faculties see themselves as pursuing, indeed by complementing those agendas, SE-Change intends to develop activities that cross UBC’s organisational boundaries. One purpose is to complement the agendas of units in particular Faculties, not least the Faculty of Management’s focus on programming that is closer to a typical North American business agenda, notably with the Bachelor of Management and its associated minors. In that context:

Learning/Student experience *

Establish dual degree, and post-experience, Master of Management.

Develop further innovative programming, e.g.: Wine Tasting Canada, wine sector co-op, wine certificate; HMPI grad program; bachelor programs mirroring MMs...

Research *

Strengthen focal-points: applied health economics, social innovation, wine (through Wine Research Centre).

Develop further focal points, e.g. international development.

* We take a holistic (rather than separable) approach to research, learning, student experience, and community engagement.

⁺ Recruiting faculty was an accepted priority for all Faculties on the Okanagan campus, hence it was not separately identified in our formal submission.

Principal challenge

Subsequent Sections of this study comment on specific opportunities and challenges facing the Faculty of Management at this point in time. A particular underlying concern is the wellbeing of faculty and staff, primarily at a human level, and also as a matter of organisational sustainability.

For a number of years, and as before the pandemic, the size of the Faculty has been a major difficulty, in the context of the requirements and expectations of UBC for administering a Faculty, the responsibility to maintain and enhance quality standards in all aspects of our activity, and the thin market, i.e. talent pool, for faculty and staff, especially for a non-metropolitan campus. That remains the case. Estimates of the minimum required size for a Faculty vary, but informal discussions amongst colleagues suggest that it is perhaps 65 active faculty members, with correspondingly proportionate numbers of staff. The Faculty of Management is currently well short of that number – it has 14 tenure stream faculty, 15 non-tenure stream, and 4 associate members.

A consequence is a lack of capacity to address crucial areas of development, ranging from basic operational matters such as representation on campus-wide committees and working groups, through to capacity to address crucial university initiatives such as EDI and anti-racism. There is also a vicious spiral. The small size places acute pressure on colleagues, who become very stretched, making recruitment efforts even more problematic.

The pressures on faculty and staff as a consequence of Faculty size have been further exacerbated by experiences throughout the COVID-19 pandemic. Taken together, these factors have significant implications for the wellbeing of faculty and staff.

DATA AND DOCUMENTATION

The remainder of this study presents data, and Faculty of Management documentation, to introduce the activities and development of the Faculty. Successive Sections, each with comments on, and summaries of, aspects of the presented material, focus on the following areas:

- A. Organising ourselves
- B. Bachelor of Management
- C. Graduate studies
- D. Interdisciplinary Co-op Education
- E. Research
- F. Community engagement
- G. Budget

Further details on these topics are also provided in the accompanying Appendices document.

Each of Sections A to G concludes with consideration of challenges, and opportunities. They are reproduced by way of a summary of some key considerations for the future development of the Faculty of Management in the concluding Section:

- H. Recap – challenges, and opportunities

A. ORGANISING OURSELVES

The faculty and staff who currently organise, manage and lead the Faculty of Management are listed in Table A1.

Table A1 Faculty and Staff in the Faculty of Management, September 2022

<u>Tenured and tenure track faculty, Lecturers, and Librarian</u>	<u>Current appointment</u>
Ardestani-Jaafari, Amir	Assistant Professor
Buschert, Kim	Librarian
Chiasson, Mike	Professor
Cockerline, Joanna	Lecturer (joint, with Faculty of Creative and Critical Studies)
Culver, Keith	Professor and Associate Dean
Davis, Jennifer	Assistant Professor
Ebl, Tamara	Lecturer
Fairweather, Annette	Lecturer
Fan, Grace	Assistant Professor
Gumpinger, Dustin	Lecturer
Gumpinger, Sarah	Lecturer
Hickey, Ross	Associate Professor (joint, with Faculty of Arts and Social Sciences)
Hilton, A. Sandy	Associate Professor of Teaching
Joy, Annamma	Professor
Li, Ping	Associate Professor
Marcolin, Barbara	Associate Professor
Martin, Jana	Lecturer
Mookken, Malida	Lecturer
Pelletier, Nathan	Associate Professor (joint, with Faculty of Science)
Pesme, Jacques-Olivier	Lecturer
Reed, Darryl	Professor (on multi-year leave)
Sugden, Roger	Professor and Dean
Vucic, Katarina	Lecturer
Walker, David	Assistant Professor
Webster, Norine	Lecturer
Westwell, Sheila	Lecturer
Zhu, Ying	Assistant Professor

<u>Associate faculty members</u>	<u>Home appointment</u>
Cioe, Jan	Associate Professor, Faculty of Arts and Social Sciences
Davies, Paul	Professor, Faculty of Arts and Social Sciences
DiLabio, Gino	Professor and Dean, Faculty of Science
Martin, Christopher	Associate Professor, Okanagan School of Education

<u>Staff</u>	<u>Current appointment</u>
Belmont, Alicia	SE-Change and Wine Research Centre Administrative and Communication Assistant
Brummet, Morgan	SE-Change and Faculty Programs Assistant
Butterfield, Mary	Senior Advisor - Research
Carter, Kristi	Associate Director, Academic Programs
Coleman, Jojo	Co-op Administrative Assistant (cover during secondment) *
Costerton-Grant, Allyssa	Associate Director, Industry Partnerships & Alumni Development
Dombrosky, Lena	Reception and Administration Assistant
Doyle, Margaret	Senior Content Strategist
Foster, Megan	Co-op and Career Coordinator *
Hancock, Dayl	Manager, Academic Programs
Klassen, Andrea	Academic and Career Advisor (joint with Academic and Career Advising)
Kristoff, Kailee	SE-Change Academic Programs Coordinator
Lauman, Sarah	Student Support Coordinator
Little, Mandy	Partner Engagement Advisor, Co-op (secondment) *
Miller, Sher	Indigenous Co-op Coordinator *
Pleasance, Rebecca	SE-Change Academic Programs Coordinator
Reid, Alexander	Programmer Analyst I
Reid, Meghan	Co-op and Career Coordinator (on leave) *
Sheldon, Dawn	Marketing and Engagement Coordinator *
Snow, Jamie	Associate Director, Community Relations
Valania, Marcela	Senior Manager - Wine Education Programs
Vanderburg, Patrick	Operations and Faculty Assistant
Zwaagstra, Nikki	SE-Change and Special Projects Administrator

* Funded by the Provost and Vice-Principal Academic Office

Our headcount number of faculty and staff has increased over recent years (Appendix A1). In 2016, we had 11 tenure stream faculty: 6 assistant professors, one associate professor, two professors, one associate dean and one dean. By 2021, we had 16: 6 assistant professors, one associate professor of teaching, 3 associate professors, 4 professors, one associate dean and one dean. This remained extremely small, and vulnerable to faculty moving to other positions – in summer 2022, one professor and one assistant professor left the university, and another professor went on multi-year leave. In the same time period, we have significantly increased the number of lecturers, from 4 in 2016 to 8 in 2021; and the staff headcount rose from 12 in 2016 to 18 in 2021.

Preferred approach

Recognising that, as a group of colleagues we have diverse capabilities, experiences and histories, our ideal approach to organising, managing, and leading the Faculty emphasises:

- Decision-making on the basis of reason, evidence and sensibility, seeking consensus through consultation and sharing but subject to resource and timing constraints
- We are all peers - each colleague is necessary for the success of the organization, notwithstanding differences in role, experience, capability and responsibility
- Respect for the (actual and delegated) decision-making responsibility of individual colleagues according to the functional hierarchies required by the university
- Each of us is independent yet also responsible to the others

By way of example of this approach in practice, see also Section B, specifically the subsection on how we have managed the Bachelor of Management during COVID-19, and the associated details in Appendices B5 and B6. That illustrates our preferred approach, as a Faculty, to organising, managing, and leading. For instance, the document in Appendix B5 about Bachelor of Management delivery in 2020/2021, that was shared at Faculty Council, lays out reasons for decisions, presents evidence, is infused by sensibility for each person and their circumstances, and intends to respect the contributions and needs of everyone in the Faculty.

We have also aimed to prioritise the freedom of faculty and staff to take responsibility and initiative. As an aspect of that, our ideal approach to the Faculty emphasizes:

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

Faculty Council

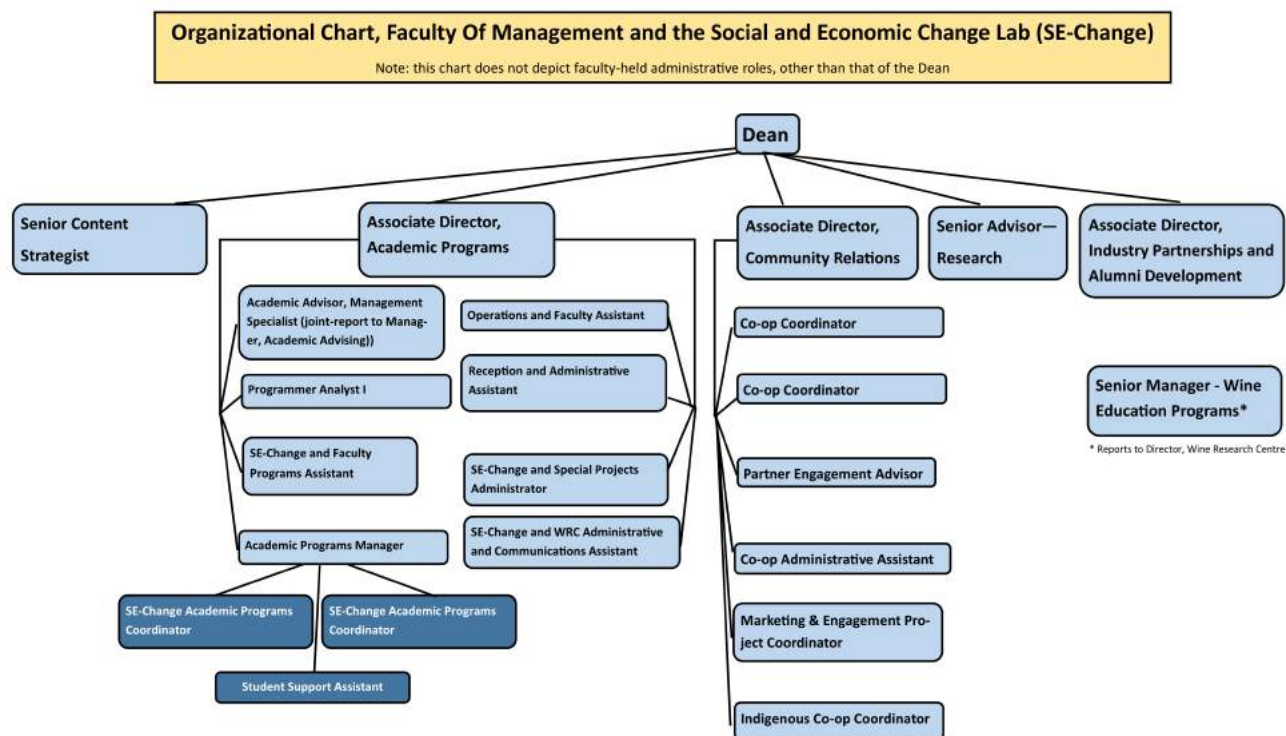
The principal formal arena in which we come together as a Faculty is Faculty Council. Meetings are held monthly throughout much of the year, and as required. At Council, we communicate with each other about key issues, as well as discuss Faculty business requiring decision and action. Matters that the Faculty sends to the Okanagan Senate are voted upon at Council.

Matters are brought to Council by the Dean, or colleagues, or the Undergraduate Curriculum Working Group, or the Masters of Management Curriculum and Admissions Working Group. The Undergraduate Curriculum Working Group is chaired by the Faculty's Undergraduate Curriculum Lead. It comprises three members of faculty and staff who are appointed by the Dean with due regard for equity and balance, and up to two faculty members elected from amongst all faculty. The Working Group meets regularly throughout the year. It takes initiative on any matters pertinent to the operation of our Bachelor of Management, receives proposals for undergraduate courses or programs put forward by colleagues, initiates its own proposals, and presents all proposals to Faculty Council, together with a recommendation for how each should be managed by the Faculty. Paralleling the Undergraduate Curriculum Working Group, we have a Masters of Management Curriculum and Admissions Working Group. Its responsibilities also include reviewing all post-experience Master of Management student applications, making formal acceptance or denial decisions, and bringing an anonymized summary of the applications and decisions to Faculty Council for information.

Staff organisation

We focus staff responsibilities around programming, research, and community engagement, across which we take a holistic - rather than compartmentalised - approach, emphasising the interaction and integration across the three areas. Our staff organisation is depicted in Figure A1.

Figure A1 Staff Organisation, September 2022



Activity across Faculties, and UBC campuses

Over the last ten years our approach to organising, leading and managing ourselves has placed particular emphasis on working with other parts of the university.

The Faculty of Management is, by organisational role within the university, a stand-alone unit. In practice and by aspiration, we connect and 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. We best realise our research, teaching, and community engagement aims – and best support faculty, staff, students, and community partners - by collaborating with other Faculties and units. The Faculty is also a micro-enterprise aspiring to grow but, even with (any reasonable estimate of feasible) growth, understands that there are at least administrative efficiencies with cross-campus collaboration.

We have taken a leadership role in developing innovative programming, research institutes, and research facilities across Faculties, and campuses. For example, we opened our successful co-op program to Faculties across the Okanagan campus for students outside the management subject area, through a formal agreement amongst Okanagan Deans. It became the Interdisciplinary Co-op Education program, introduced in more detail later in this document, in Section D. Faculty and staff in the Faculty have also been at the core of developing and leading the Survive and Thrive Applied Research Initiative (UBC STAR), a unit of the Vice-Principal and Associate Vice-President, Research and Innovation portfolio.⁸

Our activities across Faculties and campuses have also led to our playing a significant role in the emergence of the Social and Economic Change Laboratory (SE-Change, <https://sechangelab.ubc.ca>), an initiative of faculty and staff from across UBC campuses and Faculties that is currently administered by the Faculty of Management.

SE-Change

The emergence of SE-Change is rooted in the commitment of faculty and staff across the Okanagan campus to innovative research, programming, and community engagement that crosses the extant organisational boundaries of UBC. A significant number of colleagues, faculty and staff, have identified major opportunities in this regard, associated with various factors. For example:

- The campus is relatively young and small, with colleagues in positions of organisational authority relatively accessible, providing space for cross-cutting initiatives that would not normally exist on the sort of campuses that are more usual for universities such as UBC.
- Publics throughout the Okanagan are open to engage with the campus on research and programs, and the challenges publics face often span disciplines and subjects that do not fit neatly within a particular UBC Faculty.

Roots in program initiatives

Identifying opportunities for research, programming, and community engagement that crosses extant organisational boundaries - and the corresponding emergence of SE-Change - is also associated with a request from the Okanagan campus Provost and Vice-Principal Academic in 2017. The Dean of the

⁸ <https://star.ubc.ca>. <https://research.ubc.ca/about-vpri/units-portfolio>.

Faculty of Management was asked 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.

These working groups developed the prospect of a new 4-month, summer program (that they called *Interprise*), envisaged as 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. The program came before the Okanagan Senate in spring 2018, and was rejected. Reflecting on that process and its outcome, some members of the working groups reconvened, joined with others, and began to explore other opportunities.

In particular, focus turned to an initiative that was at once more ambitious, and perhaps more easily recognisable as an interesting possibility for the campus: the development of a Dual Degree Master of Management. This was an initiative that had been identified a number of years earlier as something that might spur student recruitment in all participating undergraduate degree programs. Further details on the Dual Degree that emerged from this process are provided in Section C.

The Dual Degree Master of Management that was approved by the Okanagan Senate in January, 2021 was developed and brought forward by a working group with participants from Faculties and support units across the Okanagan campus: the Faculties of Arts and Social Sciences, Creative and Critical Studies, Health and Social Development, Management, and Sciences, as well as Indigenous Programs and Services, and Student Recruitment and Advising. From the outset, the new program was envisaged to be administered with the involvement of colleagues across the Okanagan campus, consistent with its origins, and its interdisciplinarity and epistemological breadth. Administering beyond a single Faculty would allow the program to be delivered and developed in ways that benefit from, and support, the expertise and approaches found amongst faculty rooted in different disciplines and subject matters, and staff based in different units, i.e., the many colleagues interested in cross-boundary research and education.

With this in mind, the materials placed before Senate recognised (Appendix C1): “This program will be administered by the Faculty of Management but involve colleagues across the UBC campus consistent with its interdisciplinarity and epistemological breadth. It is expected that the Faculties involved with the UBC Bachelor + Master of Management dual degree program option will be the following: the Faculty of Creative and Critical Studies, Faculty of Health and Social Development, Faculty of Management, Faculty of Science, Faculty of Arts and Social Science, and the School of Engineering.” More specifically, the contacts for inquiring about the program were identified in the Senate documentation to be from the Social and Economic Change Laboratory (SE-Change) in the Faculty of Management. Since fall 2019, a group of faculty and staff from across campus had been routinely meeting with each other to explore cross-cutting research and learning initiatives, including the Dual Degree Master of Management, under the SE-Change banner.

In line with those developments, the Social and Economic Change Laboratory was introduced as a unit administered by the Faculty of Management at the Faculty Council in September 2020, through descriptive documentation reproduced as Figure A2.

Figure A2 Documentation on SE-Change as a Unit in the Faculty of Management, Shared at Faculty Council, September 2020



SOCIAL AND ECONOMIC CHANGE LABORATORY (SE-CHANGE)

- A **space** that facilitates the **fluid engagement** of researchers, publics, and community collaborators (government, firms, industry associations, civil society organisations, etc.) around inter-related **social and economic change challenges**
- A **'living lab'**, evolving as to
 - The challenges analysed
 - The academic knowledge and methodologies employed
 - The specific projects underway
 - The participating researchers, publics, and community collaborators
- A **focal point for collaborative, transformative research and learning** related to *social and economic change challenges* relevant for territories
- **Facilitating connections** between:
 - Researchers with specific knowledge and territorial publics and community collaborators with specific challenges
 - Specific research and learning activities pertinent to different elements of challenges
 - Researchers, publics, and community collaborators in the Okanagan and researchers, publics, and community collaborators with complementary knowledge and challenges in other parts of the world
- Aiming to develop the reputation and capacity to **provide policy makers, citizens, industries, etc. with advice from informed public perspectives**

September, 2020

As depicted in Figure A2, within the Faculty of Management a distinction is drawn between, on the one hand, activities surrounding the Bachelor of Management and its associated initiatives, as well research by Management faculty not participating in SE-Change; and on the other hand, activities associated with SE-Change.

Within the Faculty, there is demonstrated commitment from everyone to the ongoing viability of a thriving Bachelor of Management and associated initiatives. That includes a commitment amongst colleagues also participating in SE-Change. The two sets of activities are planned as complementary, each needing and benefiting from its own space, each benefiting from the existence of the other, and each cross-fertilising the other.

Roots in research initiatives

The emergence of SE-Change is also rooted in research projects and activities that cross UBC's organisational boundaries.

For example, the Regional Socio-Economic Development Institute of Canada (RSEDIC) was a research institute on the Okanagan campus that was created in 2015, and administered by the Vice-Principal and Associate Vice-President, Research and Innovation portfolio. RSEDIC was initiated and led by colleagues in the Faculty of Management, and involved colleagues based in other Faculties. Its purpose was to impact regional economies, and to provide interdisciplinary research and training opportunities for faculty and graduate students. It housed a number of research projects, such as *Position the BC Wine Industry for international growth*, and *Socio-technical change and regional economic development*, in each of which, faculty from the Faculty of Management played leading roles. RSEDIC also ran cross-campus seed grant competitions, and supported trainees.

RSEDIC was disestablished by a vote at the UBC Okanagan Senate in February 2022, because it had been outgrown (Appendix A2). According to the Senate materials at that meeting: "In the field of socio-economic change and regional development, it has become clear – not least through the activities and successes of RSEDIC, but also through the development of initiatives such as the recently approved dual degree Master of Management, and the new Wine Sector Coop specialisation - that there are opportunities to develop interlinked research, programming and community engagement activities that are interdisciplinary, cut across the organisational boundaries of UBC and the Okanagan campus, and prioritise a global-local nexus. Those opportunities extend beyond the remit of a research institute such as RSEDIC. Accordingly, a new unit has been established by faculty and staff across campus: SE-Change (Social and Economic Change Laboratory). SE-Change is the unit that developed and will operate the dual degree MM, and it is the administrative base for the Wine Research Centre."

Current SE-Change initiatives

As regards particular initiatives currently associated with SE-Change, Figure A2 identifies not only the Dual Degree Master of Management but also others, some already existing or at advanced stages of development, some envisaged as future possibilities.

Administration of the already existing post-experience Master of Management was brought into SE-Change, alongside the administration of the Dual Degree Master of Management, for two principal reasons:

- The post-experience Master shares a curriculum with the Dual Degree that implies significant overlap across the programs, not least, when they are seen as elements in a portfolio of programs.
- The post-experience Master has been typically delivered by colleagues with expertise in disciplines across campus, and participants in SE-Change, as well as through contributions from international partners associated with SE-Change.

Administration of the Interdisciplinary Co-op Education program was also brought into SE-Change because, as described earlier, it is a program for undergraduate students in multiple Faculties across the Okanagan campus.

Also noteworthy is that SE-Change is the administrative base of the Wine Research Centre (<https://wine.ubc.ca>). For many years, the Wine Research Centre was an initiative of the Faculty of Land and Food Systems at UBC's Vancouver campus (<https://wine.ubc.ca/about/history/>). In 2020, an agreement between the Deans of Land and Food, and two Okanagan Faculties, Management and Science, led to its transformation into a dual-campus centre, to be headquartered in the Okanagan.

Participants in the Centre are based not only in the three sponsoring Faculties but also in the Faculty of Arts and Social Sciences in the Okanagan, and the Faculty of Forestry and Michael Smith Laboratories in Vancouver. There is a clear necessity to operate the Wine Research Centre as a cross-campus, cross-Faculty initiative, hence it was agreed by the sponsoring Faculty Deans that it would be administered from the newly emerging SE-Change.

Since 2020 other initiatives have also been developed, including a Festival, and a Summer Research Workshop (<https://sechangelab.ubc.ca>). The first SE-Change Festival took place in downtown Kelowna in July 2022.⁹ Through exhibitions, performances, and conversations, the festival explored social and economic change in real places – what it looks like, its effects, and how it is shaped. It brought together academics, artists, and members of publics, locally and from various parts of the world, in a forum where they can interact, express themselves, and inquire. The festival is envisaged as an annual activity, linked with the post-experience Master of Management, and the Dual Degree Master of Management, as curricular and co-curricular activity. To that end, the 2022 Festival was deliberately timed to coincide with the two-week intensive for post-experience Master of Management students.

The SE-Change Summer Workshop is also linked with the festival, and envisaged as an annual activity. The first was in Kelowna in July 2022, on *Universities and the Crisis of Authority: Revolt, Revival, or Revolution?*

Participants in SE-Change are also responsible for developing a *public engagement suite* in the UBC campus being built in downtown Kelowna (<https://news.ok.ubc.ca/2022/06/29/bold-new-plans-unveiled-for-ubco-downtown/>). Comprising varied collaboration, discussion and study areas, the suite is envisaged as an educational space enabling inquiry about the region's social and economic fabric, and its future (<https://ok.ubc.ca/about/ubco-downtown/>).

Future developments

As a laboratory, SE-Change is a unit that is administered by the Faculty of Management. Bearing in mind that the Faculty is non-departmentalised, SE-Change is not a unit that has required Senate endorsement – from a Senate perspective, SE-Change initiatives formally come from, and are the responsibility of, the Faculty of Management. The future of this arrangement is a consideration for the campus. It has been the subject of an ongoing discussion amongst faculty and staff participating in SE-Change, no matter their home Faculty or unit, for a number of years, most especially over the last 12 months. Hence, the priorities that were laid out in the 2021 campus budget and planning submission by the Faculty of Management, regarding the development of a 'stand alone' SE-Change as an academic unit related to multiple Faculties, and exclusively controlled by no one Faculty. An aim is to develop cross-Faculty relationships in ways that reap the benefits of collaboration, for the substantive research and education agenda, and for the efficient delivery of activities, and fulfillment of commitments. The intention is that, without challenging the specific agendas that individual Faculties see themselves as pursuing, and indeed by complementing those agendas, SE-Change develops research and education activities that cross UBC's organisational boundaries. One purpose is to complement the agendas of particular Faculties, including the Faculty of Management's existing programming that is closer to a typical North American business agenda, such as the Bachelor of Management and its associated minors.

⁹ <https://sechangelab.ubc.ca/festival/>.

Workplace surveys

UBC conducts a Workplace Experiences Survey intended to gather feedback from faculty and staff on their experiences of working at the university (<https://focusonpeople.ubc.ca/workplace-experiences-survey/>). Results for the Faculty of Management are shown in Tables A2 and A3.

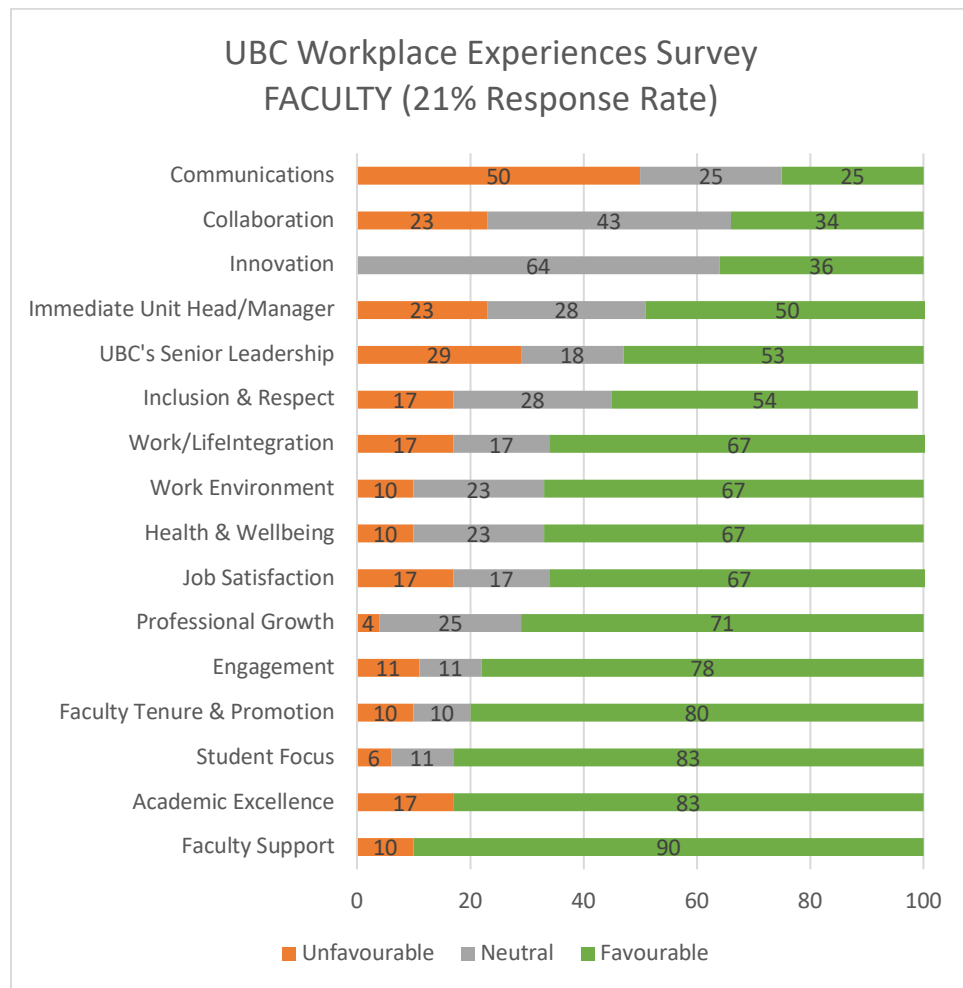
Overall, amongst the 21% of faculty who responded – a total number of 6 people - 90% were favourable about the level of “Faculty support”, and 10% were unfavourable. Amongst the 59% of staff who responded – a total number of 10 people - the most favourable outcome referred to the “work environment”: 96% were favourable, and 4% were neutral.

Areas of potential concern include “communications”: 50% of faculty viewed communications unfavourably, as did 30% of staff. In both cases, communications was the area viewed least favourably. Whilst the survey refers to communications in the university in general, it seems reasonable to think that one aspect of the concerns might refer to communications by the Faculty itself. 50% of faculty were unfavourable to the statement: “I feel well informed about what colleagues in my department/unit are working on”. The corresponding result for staff was 10%. Communications is an area for further consideration in the Faculty going forward.¹⁰

Also worthy of greater attention are the results on “inclusion and respect”. Amongst faculty respondents, 54% were favourable but 17% neutral, and 17% unfavourable. Amongst staff respondents, 85% were favourable but 13% neutral, and 2% unfavourable. It is again unclear from the survey to what extent these results reflect concerns about the Faculty, or the university more widely. 17% of faculty were unfavourable to the statement: “People treat each other with respect and consideration in my workplace.”. The corresponding result for staff was zero. In any case, the results on inclusion and respect warrant our further consideration going forward.

¹⁰ Advice from the university on interpreting the results is that “Generally, a % Favourable of 70 or above is considered good, a % Favourable in the 60s is acceptable, and a % Favourable lower than 60 would indicate the need to investigate further.”

Table A2 UBC Workplace Experiences Survey, 2021: Faculty of Management Faculty

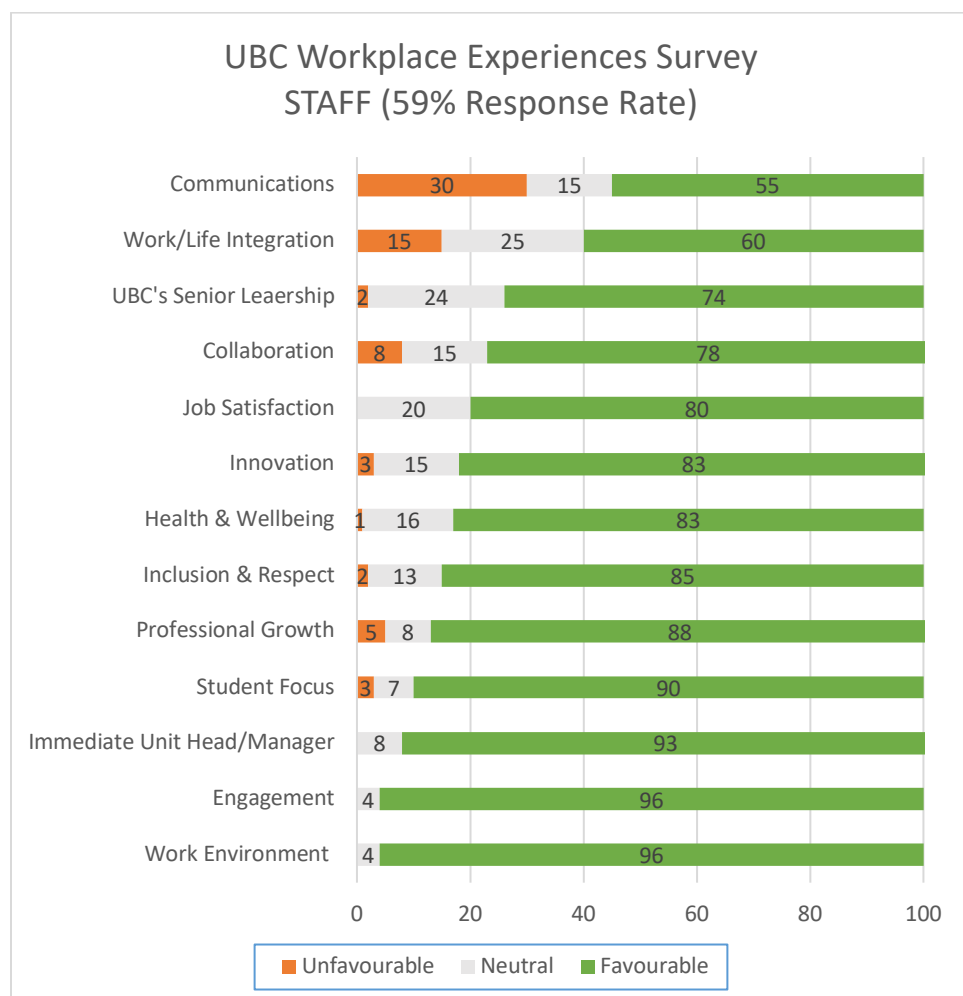
*** Key:**

% Unfavourable: represents the respondents who chose "Strongly Disagree/Disagree" or "negative"

% Neutral: represents the respondents who chose "Neither Agree nor Disagree" or "neutral"

% Favourable: represents the respondents who chose "Strongly Agree/Agree" or "positive"

Table A3 UBC Workplace Experiences Survey, 2021: Faculty of Management Staff



* Key:

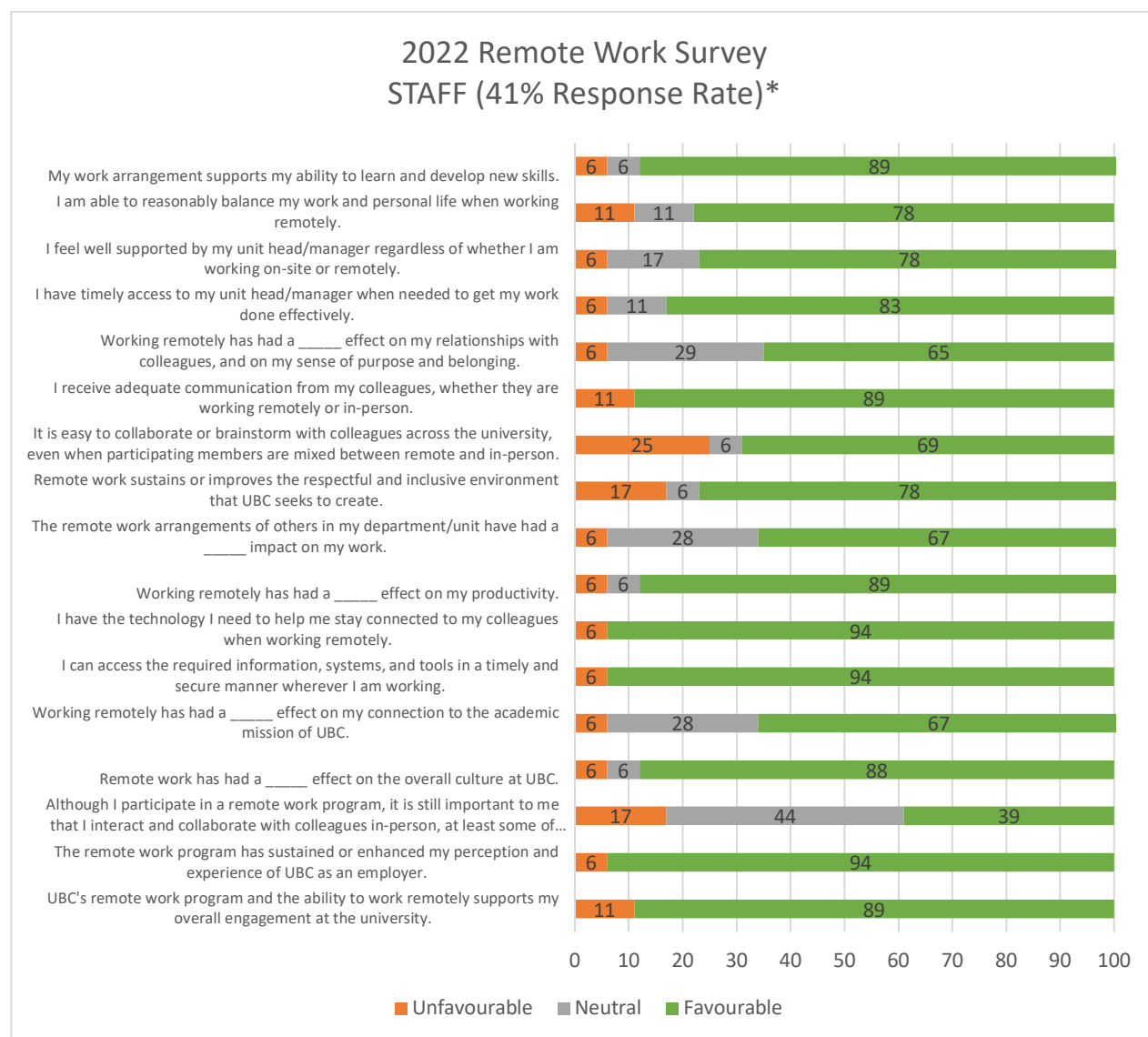
% Unfavourable: represents the respondents who chose "Strongly Disagree/Disagree" or "negative"

% Neutral: represents the respondents who chose "Neither Agree nor Disagree" or "neutral"

% Favourable: represents the respondents who chose "Strongly Agree/Agree" or "positive"

In 2022, UBC also conducted a university-wide survey about remote working. There are no results for faculty in the Faculty of Management because the number of respondents was below the minimum threshold of 5. The results for staff are shown in Table A4.

Table A4 Staff Remote Work Survey, Faculty of Management, 2022



*** Key:**

% Unfavourable: represents the respondents who chose "Strongly Disagree/Disagree" or "negative"

% Neutral: represents the respondents who chose "Neither Agree nor Disagree" or "neutral"

% Favourable: represents the respondents who chose "Strongly Agree/Agree" or "positive"

A significant number of staff in the Faculty seem to be strongly in favour of remote work. The response rate was 49%, amongst whom 89% report that “working remotely has had a favourable effect on my productivity.” 88% report that “remote work has had a favourable effect on the overall culture at UBC.” Going forward, refining remote work arrangements is an important area for further development.

Space

The Faculty has its offices, and some meeting and teaching space, in the Engineering, Management and Education Building (EME) on the Okanagan campus. The Faculty also makes use of teaching and meeting facilities spread across the campus more widely. Compared to the experiences of other Faculties in the Okanagan, our most immediate office needs are reasonably catered for by EME and other campus facilities, but we are beginning to face more and more challenges, including with the provision of research laboratory space for new faculty members.

Lack of space would hinder research activities and constrain programming. We also have concerns regarding available campus classrooms at appropriate sizes, and the space and classroom constraints off-campus. Significant aspects of our work are carried out in downtown Kelowna, and the wider Okanagan, close to the communities with which we engage. Downtown space – for meetings, and for teaching, for example on the post-experience Master of Management - is at a premium. This will be alleviated to a degree by the *public engagement suite* in the new campus, due for completion in 2025, but already our activities are close to outstripping the supply of readily useable space.

Previous external review

There has been one previous external review of the Faculty of Management, in 2017. A summary of the key findings and recommendations from that review, plus the Faculty’s response, was presented to the Okanagan Senate on 23rd November, 2017 (Appendix A3).

The reviewers found that there were positive indications that the Faculty was moving in the right strategic direction, although its turbulent past had been undermining progress and must continue to be addressed. We have attempted to develop in that direction over the last 5 years, as described and explored in the discussion of programs and activities throughout this study. The reviewers in 2017 also highlighted that the Faculty is active within the local community, which had strengthened our reputation, and that is a feature we have built upon.

The turbulent past, as such, has not been as significant a hindrance to progress as it had been until 2017 – we have stressed a forward-looking approach in which all colleagues and activities have had opportunities to thrive. As might be expected amongst any group of faculty, in practice there remain different perspectives on what the Faculty ought to be, how, and for whom, and sometimes it feels that our small size can concentrate those differences.

The report to Senate in November 2017 highlighted 4 key recommendations.

- I. *Immediately revise the curriculum to reflect the vision of UBC Okanagan and to differentiate it from other business schools. Create majors and interdisciplinary themes such as sustainability, regional development, and innovation, which are embedded in the program*

We responded that, as of September 2017, we were introducing a significant change in delivery of the Bachelor of Management program, revising its structure into a 4-year program, to increase access and exposure to key management courses and topics earlier in the program, during the first two years of

study. We also acknowledged that this revision needed to be carefully managed to ensure that all students continue to receive top-quality education. Our success in that regard is described in detail in Section B.

As a Faculty, we reported our plan to develop new activities as resources and necessary collaborative relations with other Faculties permitted, prioritising sustainability, regional development, and innovation as topics, potentially accompanied by other opportunities arising from campus and wider UBC perspectives. At the time, faculty were contributing to an inter-Faculty working group developing proposals for themes in the Interdisciplinary Graduate Studies program. Those initiatives have since come to fruition, administered by the College of Graduate Studies, including: sustainability; urban and regional studies; and community engagement, social change, and equity. Other notable inter-Faculty initiatives in this spirit since 2017, and in which we have played a significant role, include introduction of the Dual Degree Master of Management, described and discussed in detail in Section C.

In 2017, we recognised that the new structure of the Bachelor of Management also offered 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. Such a review was the focus of a 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 since been taken up, before and during the Covid pandemic.

In 2018, we explored in depth the possibility of undertaking a holistic review of Faculty priorities in light of our vision, and how they are translated into substantive activities, informed by budget implications. (The intention was to tie into another recommendation of the 2017 review, to develop a strategic plan for the Faculty.) A particular focus was to have been the Bachelor of Management, including its curriculum. The process was to be enabled by external facilitators, learning from experiences in what is now the Okanagan School of Education. Following detailed discussions with the facilitators, we chose to delay the process because of increasing strains on faculty colleagues. It would have asked too much of already overworked Faculty officers, jeopardising their wellbeing. Colleagues were already contributing beyond reasonable expectations. We were also facing significant uncertainties over recruitment and appointment into key roles. Accordingly, we postponed the holistic and detailed review until capacity constraints eased, whilst simultaneously continuing with an ongoing series of significant enhancements to the Bachelor of Management. Those improvements are described in Section B. We then ran into the Covid pandemic.

II. *Brand and position the Bachelor of Management program at UBC Okanagan to avoid confusion with traditional business programs*

We welcomed this advice as confirmation of our ongoing approach, and have since explored various ways of achieving success, including the appointment of a Faculty communications and marketing strategist, and aligning the efforts of different support units across the university. We now work especially closely with Student Recruitment services, around which we focus our activities. Together, we have been operationalising a longer-run approach to positioning, and recruiting to, the Bachelor of Management.

In 2017, we also pointed to our leading role on the Okanagan campus in emphasising faculty joint appointments, and the unique opportunities this strategy affords with respect to moving beyond traditional business programs. That strategic direction is reflected in our continued efforts re joint appointments, for example in communication, economics, and sustainability. It is also shown by our contributions to the vision for, and activities of, the Social and Economic Change Laboratory (SE-Change).

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

We welcomed this idea as very appealing. Following discussions across campus about the best ways to proceed, we have kept alive the possibility of our own program - recognising this would require development fundraising that has not yet borne fruit - and we have made significant efforts to benefit from wider initiatives. Our response referred to an immediate objective of supporting a faculty member who is jointly appointed with the Department of Biology in the Irving K Barber Faculty of Sciences, in his application for an NSERC industrial research chair. We provided significant resources to support the application, which was successful.¹¹ So too its recent renewal. Over recent years, we have also successfully supported faculty applying for, and receiving, a Canada Research Chair,¹² Principal's Research Chair (a cross-campus initiative from the Okanagan campus),¹³ and Michael Smith Foundation for Health Research Scholar.¹⁴ Those successes were firsts for the Faculty.

IV. *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*

We took up this recommendation, building on the fact that a number of colleagues had already responded to encouragement by enthusiastically embracing change in this regard. Further changes were introduced to make teaching across two terms a norm. The workload principles for the academic year 2019-2020 included the following statement: "in any and all cases, in order to fulfill contractual expectations wherever possible, research faculty will be scheduled to teach in only 2 of the 3 semesters, to allow for research time, and lecturers will be available to teach or to be involved in teaching preparation, across 3 semesters." Changes introduced in response to Covid (as discussed in Section B) altered that expectation. We recognise that, as the Faculty determines a new normal for its operation, the delivery of teaching across terms needs to remain a consideration.

Challenges, and opportunities – Organising ourselves

- The size of the Faculty is an important challenge when thinking about how we organise, manage and lead ourselves. In the context of the requirements and expectations of UBC for administering a Faculty, the Faculty of Management is a micro-enterprise. That gives us cause for concern about the wellbeing of faculty and staff, first and foremost at a human level, additionally as a matter of organisational sustainability. The required minimum size for a Faculty is unclear, informal discussions amongst colleagues suggesting that it is perhaps 65 active faculty members, with correspondingly proportionate numbers of staff. Whatever the precise number, we are far short.
- The Faculty currently lacks the capacity to address crucial areas of development, including basic operational matters such as representation on campus-wide committees and working groups, through to addressing crucial university initiatives such as EDI (equity, diversity, and inclusion) and anti-racism. We are also in a vicious spiral:
 - The small size places acute pressure on colleagues, who become very stretched, making recruitment efforts even more problematic
 - Experiences throughout the COVID-19 pandemic have seriously exacerbated the pressures on faculty and staff

¹¹ Nathan Pelletier, NSERC/Egg Farmers of Canada Industrial Research Chair in Sustainability.

¹² Jen Davis.

¹³ Eric Li.

¹⁴ Jen Davis.

- Notwithstanding our ideal approach to organising, managing, and leading the Faculty, and as might be expected, in practice there remain disagreements amongst colleagues. There are different perspectives on what the Faculty ought to be, how, and for whom, and the impact on activities, operations, and people is perhaps exacerbated by our being such a small Faculty.
- UBC's grading standards for management and professional (M&P) staff are based on the roles and requirements of UBC's Vancouver campus. This has made it difficult to appropriately classify, or re-classify, staff positions in the Faculty. The grading of positions is crucial to attracting, retaining, and respecting capable and talented staff. While we are a young Faculty with lots of room for change, we are at a pivotal point. We need capable staff, whose responsibilities in complex, change-oriented environments are different from those in an established Faculty with large numbers of staff carrying out specialist roles (the norm on the Vancouver campus). Classification of staff positions on the Okanagan campus seems to be understood primarily as a difference in volume and scale compared to Vancouver, rather than as a substantive difference in complex and changing tasks and responsibilities, with particular roles spanning an unusually wide area of specialisations, without diminishing the depth of expertise and competence expected in each area.
- Our Faculty organisation distinguishes between two sets of activities that are both important to the campus going forward:
 - Activities surrounding the Bachelor of Management and its associated initiatives, as well research by Management faculty not participating in SE-Change
 - The coming together of faculty and staff from across Faculties and campuses through SE-Change

Both include exciting opportunities for future development. How the two areas, and the relationship between them, are managed going forward, will be a major influence on the success of the Faculty, and significant for UBC in the Okanagan.

- Workplace surveys suggest a number of areas warranting future consideration in the Faculty, including: communications, inclusion and respect, and remote working.
- How remote work possibilities are managed, for staff and faculty, will impact the Faculty's requirements for physical space, and bear in mind that we are already facing increasing space challenges.

B. BACHELOR OF MANAGEMENT

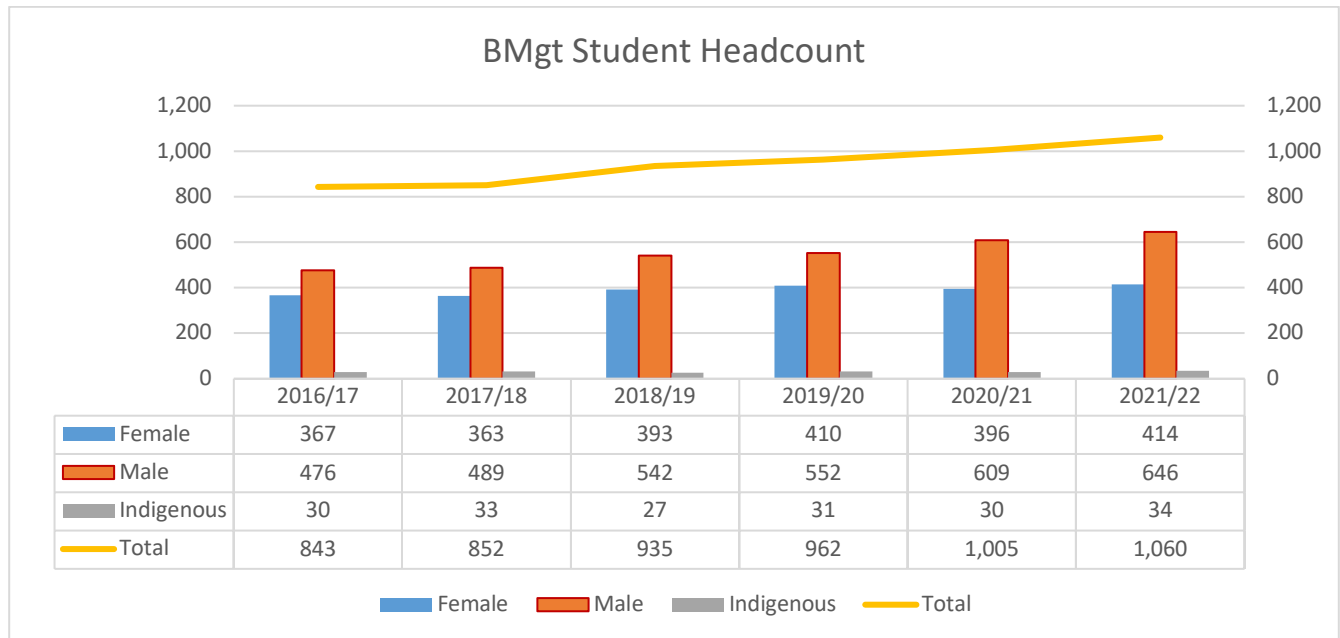
The Bachelor of Management (BMgt, <https://management.ok.ubc.ca/academic-programs/bachelor-of-management/>) began student intake in 2005. It was originally designed as a 2+2 structure. Students in their first two years enrolled in a broad selection of elective courses in arts and sciences as well as in management. In the second two years, students first completed a series of compulsory courses, then took electives in their chosen areas of focus. In 2016, we engaged in a major curriculum renewal. Following extensive stakeholder consultation, we revised the program, to increase student exposure to the management subject area earlier in their academic careers, and to encourage a deeper understanding of the subject area in ways that enabled students to pursue their areas of interest. The revisions also opened possibilities for minors, for example by moving away from a situation where the third and fourth years for BMgt students were necessarily crammed with Faculty of Management courses.

Operation and delivery of the BMgt is overseen by the Faculty's Undergraduate Curriculum Lead, and by the Academic Programs Office. Appendix B1 presents the current Academic Calendar program overview and course descriptions. In 2017, the revised BMgt welcomed the first cohort. In the first few years we simultaneously delivered the 2+2 to students who were already registered in the program, which meant that we managed “bulge years” of up to an additional 250 students in each of 11 required courses.

Since the revisions, we have been concerned to consolidate our delivery of the 4-year program, and since early 2020 to do so notwithstanding the disruptions and implications of COVID-19. We have also continued to innovate, remaining true to the essence of our aspirations for the BMgt as a general management program that is structured around business functions, draws upon experiences with such programs in North America, and looks to educational opportunities arising from our location in the Okanagan. For example, there has been significant work on mapping the BMgt curriculum to learning outcomes, which is ongoing. We have developed courses such as Global Food Systems: Society, Ecology, Sustainability; and Managing and Leading Non-Profit and Public Sector Organizations. Course content has been significantly revised in, for instance, Operations Management; Leadership in Complex Environments; Globalization, Offshoring and Outsourcing; New Product and Service Development; and Capstone Service Learning and Consulting, where we have increased attention on not-for-profits and governmental partners, in addition to for-profit, reflecting the educational opportunities from our location in the Okanagan. We have remained committed to offering the courses needed to satisfy professional designations, notably for accounting, notwithstanding the strain on our resources. We have introduced new opportunities for all students through minors, for example reflecting the view that an understanding of management can benefit from study of varied and wide-ranging disciplines and subject areas that can be found throughout a university, across the social sciences, humanities, arts and sciences.

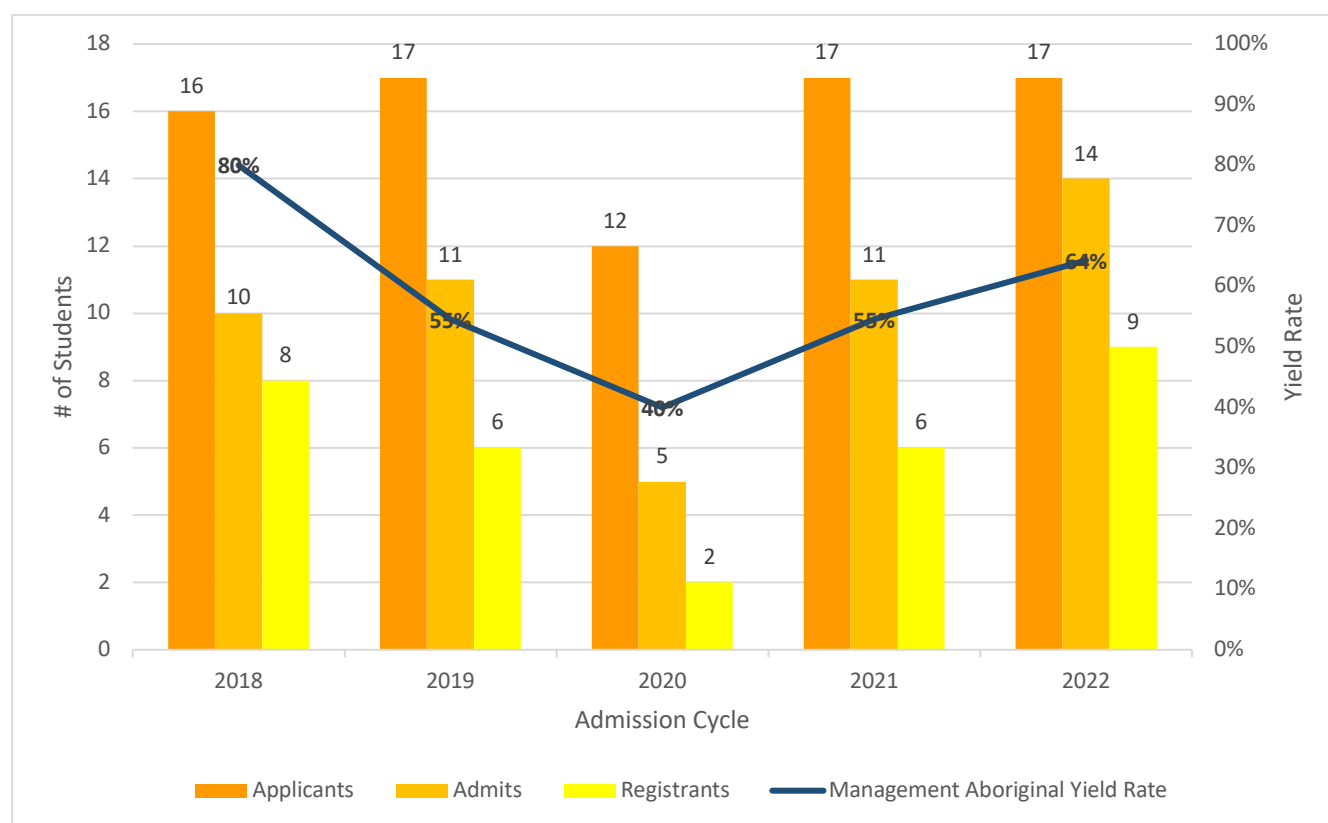
Over the last five years, student numbers have steadily grown, notwithstanding the COVID-19 pandemic. There are presently 1060 students registered in the BMgt (Table B1). Admission is managed through the campus central administration. It is competitive, based on incoming grades, and, as of 2016, required a set of short essay responses termed “broad-based admissions”.

Table B1 BMgt Student Headcount



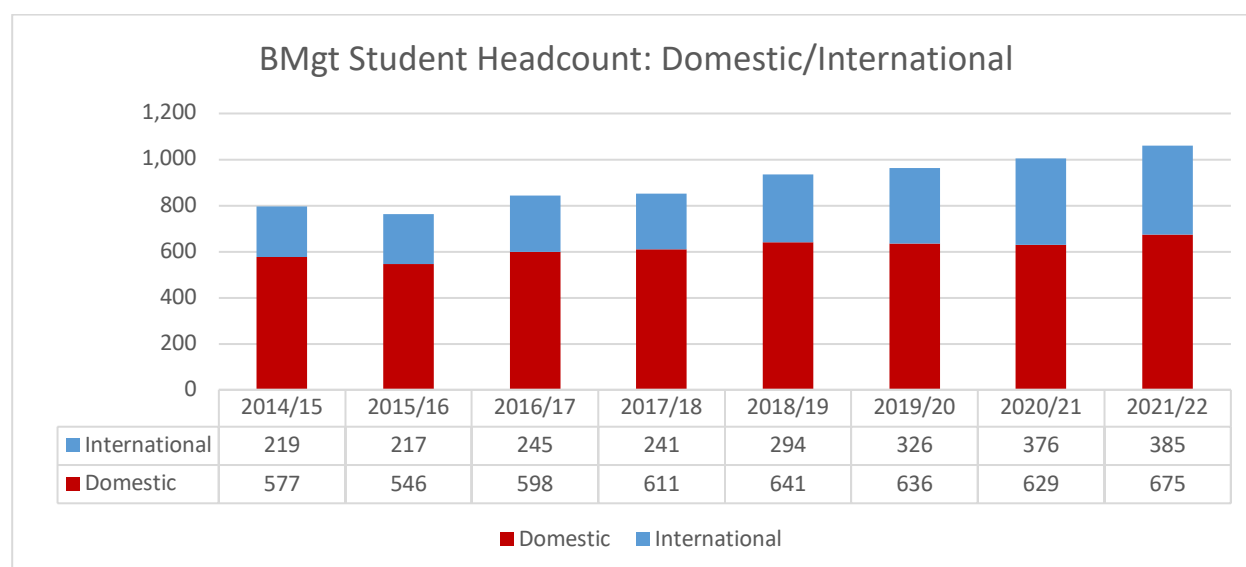
The number of Indigenous student applicants, admits and registrants to year 1 of the BMgt who identified the program as their first choice are shown in Table B2 for each of the years 2018 to 2022. The total number of registrants dipped during COVID but the number has now returned to the 2018 level.

Table B2 BMgt Year 1, Choice 1, Indigenous Applicants, Admits, and Registrants, 2018-2022.



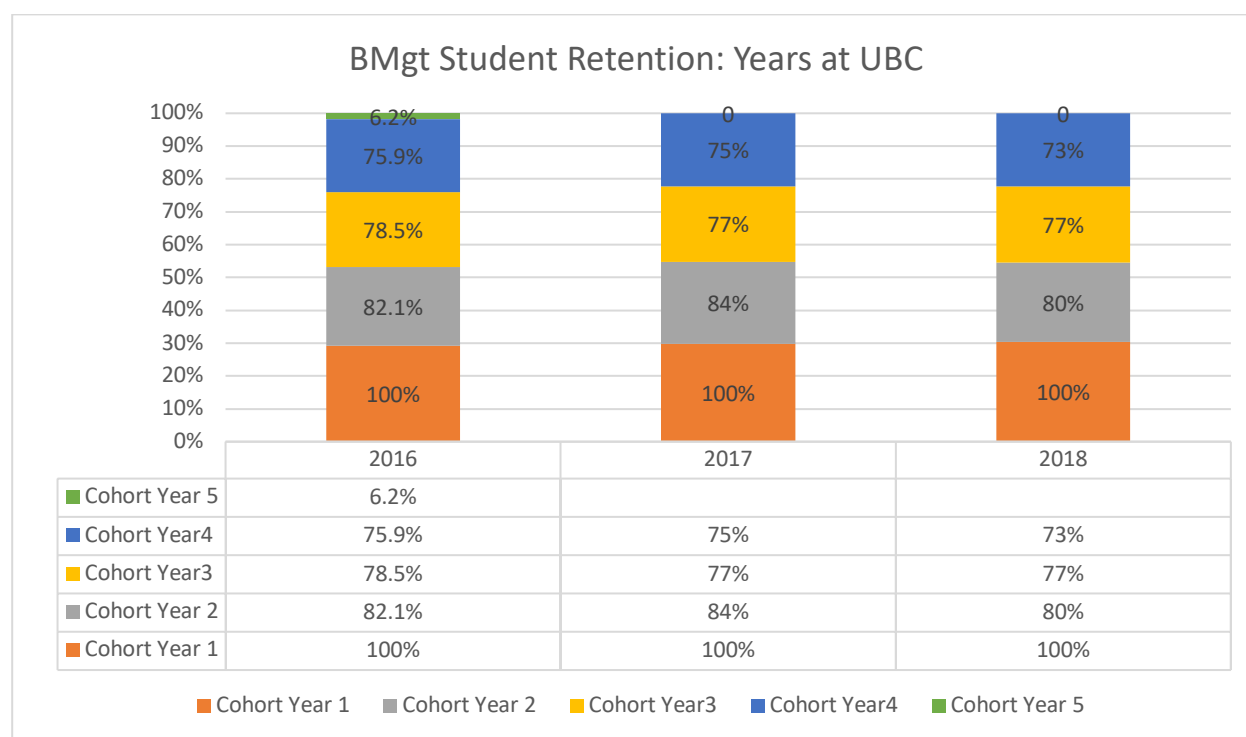
Approximately 36% of undergraduate students are international students (Table B3). Since 2014, the BMgt has welcomed students from 75 countries (Appendix B2).

Table B3 BMgt Student Headcount: Domestic/International



Since 2016, the program has had consistent retention with approximately 25% of undergraduate students admitted leaving the program prior to completion (Table B4).

Table B4 BMgt Student Retention: Years at UBC



The most recent Undergraduate Experience Survey results indicate that 80% of Management students responded positively to the question “If I was starting again, I would choose to attend Management”. Appendix B3 presents the results in more detail. See also Appendix B4, and Appendix E2, which provide an indication of the interests and aspirations of BMgt students by reproducing some stories about particular individuals.

The aggregated results of student evaluation of teaching/experience of instruction in the Bachelor of Management are shown in Tables B5, B6, and B7, and the comparisons with the campus average in Tables B6 and B7.¹⁵

¹⁵ In May 2020, UBC changed the name of the process for gathering feedback from students, from student evaluation of teaching, to student experience of instruction (<https://pair.ubc.ca/surveys/student-experience-of-instruction/>).

Table B5 Bachelor of Management Student Evaluation of Teaching, Percent Favourable Mean, 2016-2020*

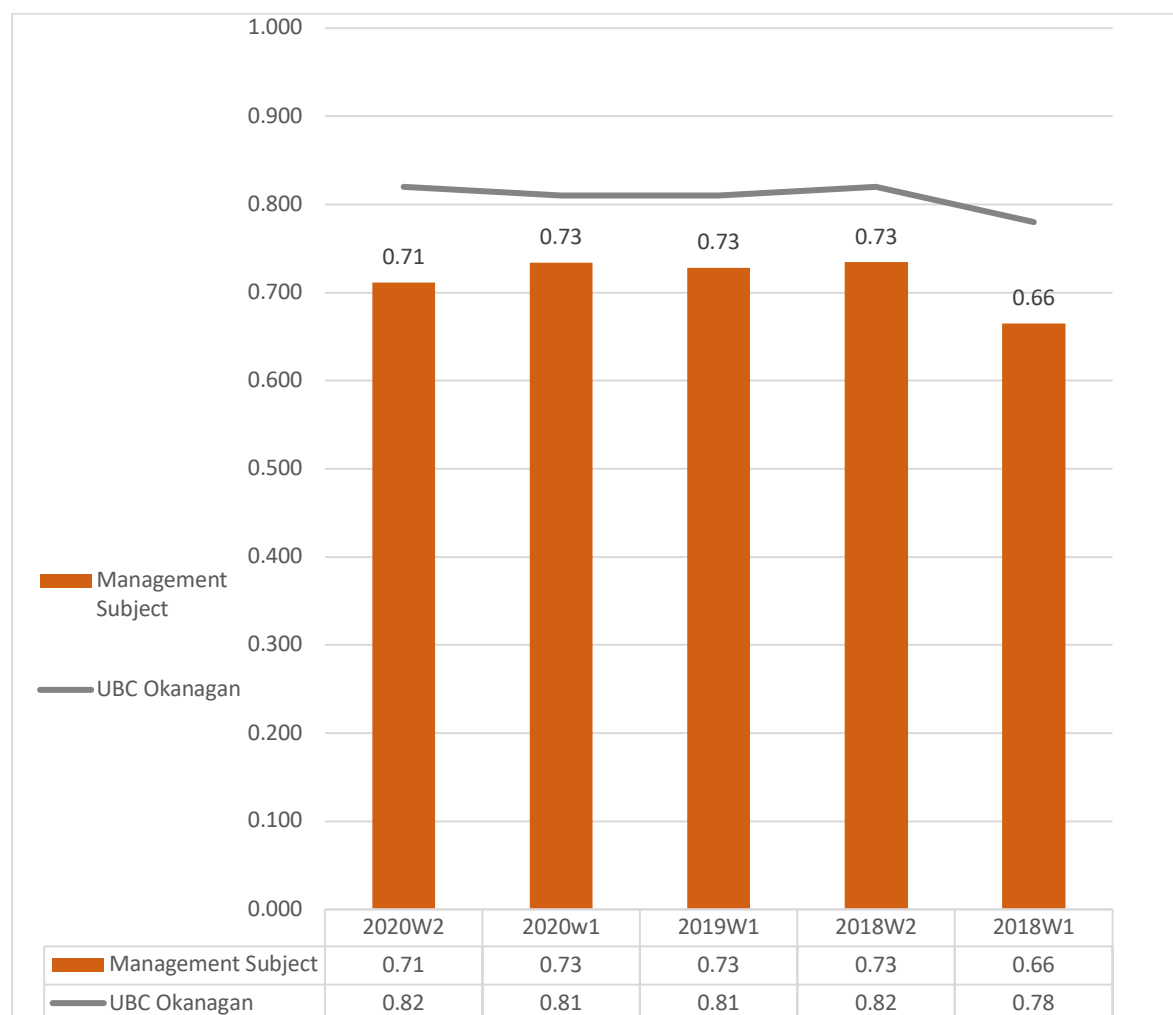
	2016 WT1*	2016 WT2*	2017 WT1	2017 WT2	2018 WT1	2018 WT2	2019 WT1	2019 WT2	2020 WT1	2020 WT2
The textbook and/or assigned readings contributed strongly to this course.	0.6	0.73	0.79	0.65	0.72	0.67	0.75		0.78	0.74
I found the course content challenging.	0.66	0.7	0.65	0.66	0.63	0.68	0.68		0.68	0.66
I consider this course an important part of my academic experience.	0.72	0.79	0.73	0.7	0.73	0.71	0.77		0.77	0.71
I would rate this course as very good.	0.6	0.72	0.67	0.59	0.55	0.62	0.62		0.68	0.61
Students were treated respectfully.	0.76	0.84	0.83	0.76	0.78	0.79	0.86		0.88	0.83
The instructor was available to students outside class	0.76	0.86	0.83	0.81	0.66	0.82	0.71		0.79	0.78
The instructor responded effectively to students' questions.	0.7	0.82	0.8	0.75	0.69	0.76	0.77		0.77	0.69
The instructor demonstrated a broad knowledge of the subject.	0.79	0.9	0.86	0.82	0.75	0.84	0.82		0.79	0.79
The instructor showed enthusiasm for the subject matter.	0.83	0.91	0.87	0.84	0.76	0.82	0.76		0.75	0.8
The instructor encouraged student participation in class.	0.85	0.88	0.9	0.88	0.76	0.85	0.8		0.7	0.76
The instructor set high expectations for students.	0.81	0.84	0.85	0.82	0.7	0.81	0.79		0.78	0.79
The instructor fostered my interest in the subject matter.	0.58	0.67	0.63	0.54	0.53	0.58	0.59		0.58	0.57
The instructor effectively communicated the course content.	0.6	0.75	0.71	0.62	0.63	0.68	0.67		0.68	0.65
The instructor used class time effectively.	0.6	0.77	0.73	0.63	0.6	0.69	0.68		0.69	0.69
Where appropriate, the instructor integrated research into the course material.	0.65	0.79	0.75	0.71	0.58	0.7	0.66		0.7	0.72
The instructor provided effective feedback.	0.62	0.75	0.72	0.66	0.59	0.69	0.66		0.68	0.66
Given the size of the class, assignments and tests were returned within a reasonable time.	0.68	0.83	0.8	0.84	0.66	0.83	0.81		0.81	0.74
The evaluation procedures were fair.	0.64	0.79	0.74	0.71	0.68	0.75	0.76		0.74	0.67
I would rate this instructor as very good.	0.63	0.75	0.72	0.64	0.62	0.68	0.68		0.69	0.65

* Notes:

Percent favourable represents the proportion of respondents who rated the instructor a 4 or 5 (Agree or Strongly Agree) on a scale of 1 to 5 (1 being Strongly Disagree, 2 being Disagree, 3 being Neutral). Percent favourable mean is the mean outcome across all courses. Results are presented on a scale of zero to 1: zero is where no respondents rate the instructor 4 or 5, and 1 is where all respondents rate the instructor 4 or 5.

WT1 refers to winter term 1, which is in the fall (September to December). WT2 refers to winter term 2, which is in the spring (January to April). For example, in academic year 2016-2017, 2016WT1 runs September-December 2016, and 2016WT2 runs January-April 2017.

*Table B6 Bachelor of Management Student Evaluation of Teaching Compared to Total Okanagan Campus, Percent Favourable Mean, * 2018-2020*



** Notes:*

Percent favourable represents the proportion of respondents who rated the instructor a 4 or 5 (Agree or Strongly Agree) on a scale of 1 to 5 (1 being Strongly Disagree, 2 being Disagree, 3 being Neutral). Percent favourable mean is the mean outcome across all courses. Results are presented on a scale of zero to 1: zero is where no respondents rate the instructor 4 or 5, and 1 is where all respondents rate the instructor 4 or 5.

WT1 refers to winter term 1, which is in the fall (September to December). WT2 refers to winter term 2, which is in the spring (January to April). For example, in academic year 2018-2019, 2018WT1 runs September-December 2018, and 2018WT2 runs January-April 2019.

Table B7 Bachelor of Management Student Experience of Instruction, Percent Favourable Mean, 2021*

New Questions in 2021	BMgt 2021WT1*	UBC Okanagan
	% favourable	% favourable
Throughout the term, the instructor explained course requirements so it was clear to me what I was expected to learn.	0.74	0.79
The instructor conducted this course in such a way that I was motivated to learn.	0.59	0.64
The instructor presented the course material in a way that I could understand.	0.7	0.72
Considering the type of class (e.g., large lecture, seminar, studio), the instructor provided useful feedback that helped	0.63	0.64
The instructor showed genuine interest in supporting my learning throughout this course.	0.68	0.74
Overall, I learned a great deal from this instructor.	0.65	0.72

** Note:*

Percent favourable represents the proportion of respondents who rated the instructor a 4 or 5 (Agree or Strongly Agree) on a scale of 1 to 5 (1 being Strongly Disagree, 2 being Disagree, 3 being Neutral). Percent favourable mean is the mean outcome across all courses. Results are presented on a scale of zero to 1: zero is where no respondents rate the instructor 4 or 5, and 1 is where all respondents rate the instructor 4 or 5.

WT1 refers to winter term 1, which is in the fall (September to December). For example, in academic year 2021-2022, 2021WT1 runs September-December 2021, and 2021WT2 runs January-April 2022.

The Faculty is below the campus in each mean or score where there is comparison data. That is clearly a cause for concern, and warrants further consideration amongst colleagues. One factor is perhaps related to a distinguishing feature of the BMgt, its diversity in terms of the proportion of international students, hence diversity across student backgrounds, interests, future aspirations, and prior experience of learning modes. We are aware that this puts an onus on us to do all that we can to enable all students to access learning environments, and indeed campus and Okanagan life more generally, and that achieving those outcomes is a process requiring time to adapt and innovate. The entire campus is addressing such matters but the Faculty of Management is amongst those at the forefront of this change. Currently, 36% of BMgt students are international students (Table B3), about double the campus average.

The most recent scores show signs of improvement, a narrowing of the gap with the campus, albeit they only reflect student feedback during one term (Table B7). The narrowing might reflect the levelling of the playing field in terms of online access to learning across most campus students during the period March 2020 to April 2022. Perhaps also, the increased collaboration and sharing across students, faculty, and staff in planning and designing BMgt course delivery during the uncertainties of COVID-19, in which case there are foundations upon which the Faculty can build going forward.

BMgt during COVID-19 (and an illustration of how we organise, manage, and lead ourselves)

Much of the last two years has been occupied with effective operation during the COVID-19 pandemic, placing the wellbeing of students, staff and faculty at the centre, and trying to ensure that we can all carry out our activities as effectively as possible, together. Our approach is typified by the document

shared at Faculty Council in the early days of the pandemic, on 20th May, 2020 (Appendix B5). A revised draft of a document that had been discussed at Council the month before, it lays out an approach to BMgt program delivery in academic year 2020/2021.

When COVID-19 was breaking the Faculty went online effectively overnight. We immediately formed a small, nimble group of faculty and staff to identify challenges, and think through possibilities. A planning document was drawn up, laying out the circumstances, reasoning, and a path forward, so that the approach could be shared, discussed and explored with faculty, staff, and the BMgt student representative at Faculty Council. To illustrate, the document shared in May, 2020 recognised:

- Faculty, staff and students have the right to be in a safe environment; we should not and will not require people to come to campus in unsafe circumstances.
- A major concern is pressures on students, faculty and staff. An implication is our need to ensure as much time as possible to enable everyone to think about what supports they might require, so that we can do everything possible to put them into place. We also need to build into our plans cover for unexpected faculty and staff absences.
- Another major concern is the accessibility requirement for a public university: we need to do all that we can to enable access to the Bachelor of Management for all students - existing, and those we are committed to admit - bearing in mind that their extremely varied circumstances have changed, and are changing, beyond their control. For example, we have a responsibility to enable access for international and other students who might find it difficult, because of COVID-19, to travel to Kelowna, or to fund a presence in Kelowna in light of economic upheavals, etc.

The document also laid out our aims, and our objectives:

- To maintain a commitment to community and connection in student learning
- To deliver all MGMT courses that are offered in fall 2020 in a virtual learning environment
- To retain the possibility of complementing virtual delivery with on-campus face-to-face experiences if opportunities arise, whilst ensuring that on-campus face-to-face is not a requirement for course completion
- To ensure that if and where virtual delivery is augmented by on-campus face-to-face experiences, all students not participating on campus will be provided with a comparable quality of learning through the virtual learning environment
- To develop a virtual learning environment committed to developing community and connection amongst students, faculty and staff
- To maintain program integrity
- To ensure revised faculty teaching workload in the COVID-19 context as close as possible to originally assigned workloads, consistent with the collective agreement
- To focus on the 'essential' course offering, i.e.:
 - Sufficient courses to enable students to graduate, or progress to their next year of study, as required
- To be mindful of the accessibility challenges faced by students who are in multiple time zones across Canada and internationally, and consider the suitability of asynchronous versus synchronous activity accordingly
- To be aware of ongoing student recruitment needs

In many ways, the purpose and content of the document in Appendix B5 reflects, and illustrates, our preferred approach to organising, managing, and leading ourselves as a Faculty.

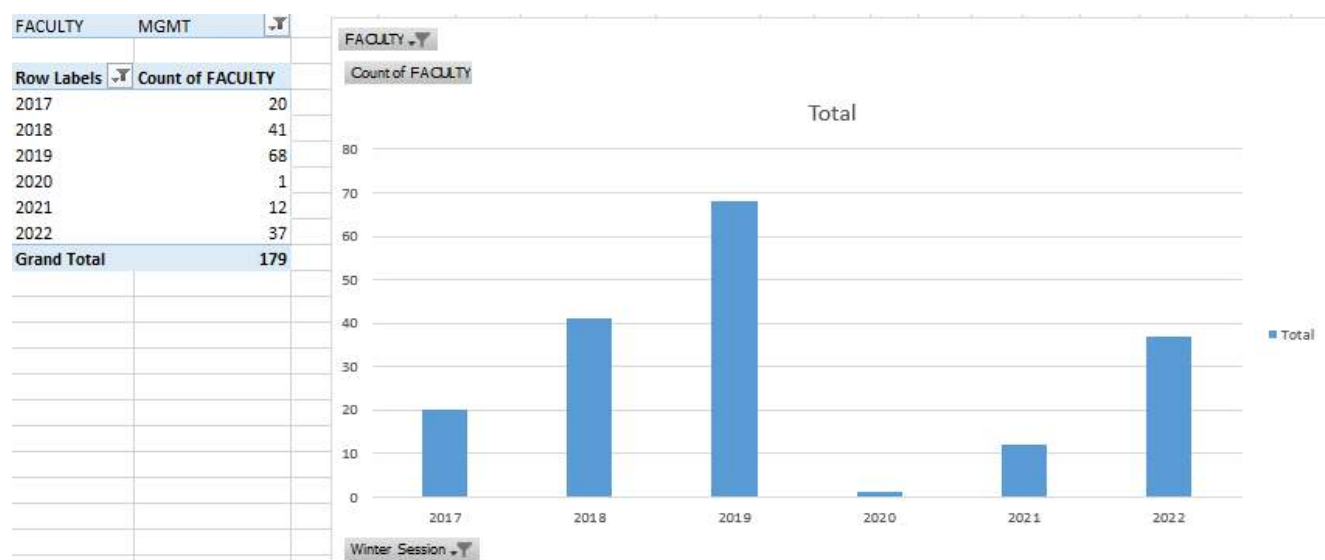
The same might also be argued for the approach that we took to exploring possibilities for delivery in the academic year 2021/2022. We built on what we did for 2020/2021, and, in particular, took advantage of the longer time horizon to establish a working group to explore potential modes of delivery in 2021/2022, in light of the circumstances and uncertainties implied by COVID-19.

The working group was made up of 5 students across different BMgt years, 2 faculty members, 1 staff member, and the dean: Emily Bowen, Kristi Carter, Mike Chiasson, Kobe Hum, Ashley Larkin, Jana Martin, Hunter (Jiawen) Shi, Roger Sugden, and Hunter Wilson. We worked closely with the Management Student Association (MSA) in setting up the group. It met routinely between January and July 2021 to explore the types of in-person opportunities that might be offered to BMGT students in 2021W. It presented to Faculty Council on 21st April, 2021 for discussion and feedback, and circulated a final report the following July. The report is presented in Appendix B6.

Go Global

BMgt students have the opportunity to participate in Go Global, a post-secondary academic exchange program at UBC administered by Student Services (<https://students.ok.ubc.ca/global-engagement-office/go-global/>). It is a program that allows students to take one or more courses at specific partner institutions around the world, and those courses are counted towards degree requirements at UBC. In 2017 there were 20 BMgt students participating in Go Global, and in 2022 there were 37 (Table B8). There was a steady year-on-year rise between 2017 and 2019, then an interruption from COVID-19. Since 2021, there are signs that the numbers are once again picking-up.

Table B8 Number of BMgt Students participating in Go Global, 2017-2022



Co-op education

Many BMgt students participate in the Interdisciplinary Co-op Education program, a cross-Faculty initiative established and developed through the academic and administrative leadership of the Faculty – see the detailed presentation of the program in Section D. In 2021-2022, BMgt students completed 77 co-op work terms (Table D2). That was an increase of about one third from the previous year, and about one quarter the 2021-2022 total work terms on the Interdisciplinary Co-op Education program. In total over the period 2017 to 2022, there were 179 BMgt student participating in Go Global, mostly in the period May to December.

Minors for BMgt students

The Faculty also provides BMgt students with opportunities to take various minors that are offered by other Faculties across the Okanagan campus. Opportunities in this regard increased significantly after 2017, once the BMgt had been transformed into a 4-year program. We currently offer five possibilities:

Minors Available to BMgt Students

Minor in Computer Science

To complete a Minor in Computer Science, students must accumulate no fewer than 30 credits in Computer Science. At least 18 of these credits must be numbered 300 or above. This may require students to take additional credits of study.

Minor in Cultural Studies

To complete a Minor in Cultural Studies, students must accumulate no fewer than 30 credits in Cultural Studies as specified below. This may require students to take additional credits of study.

- CULT 100, 101;
- At least 6 credits of 200-level CULT; and
- At least 18 credits of 300- or 400-level courses applicable to the Major in Cultural Studies.

Minor in Economics

To complete a Minor in Economics, students must accumulate no fewer than 30 credits in Economics. At least 18 of these credits must be numbered 300 or above. This may require students to take additional credits of study.

Minor in Psychology

To complete a Minor in Psychology, students must accumulate no fewer than 30 credits in Psychology. At least 18 of these credits must be numbered 300 or above. This may require students to take additional credits of study.

Minor in Sociology

To complete a Minor in Sociology, students must accumulate no fewer than 30 credits in Sociology as specified below. This may require students to take additional credits of study.

- SOCI 111, 121;
- At least 6 credits of 200-level Sociology (excluding SOCI 202);
- 18 credits of 300- or 400-level Sociology.

Consistent with the increased opportunities resulting from the BMgt being revised into a 4-year program, the number of BMgt students taking minors in other Faculties has grown significantly over recent years, from a total of 40 in 2016/2017 to 156 in 2021/2022 (Table B9).

Table B9 Number of Bachelor of Management Students taking a Minor offered by another Faculty, and by Domestic or International Student

Subject	Status	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
COMPUTER SCIENCE	Domestic			1	5	8	11
	International				7	7	9
	Total			1	12	15	20
CULTURAL STUDIES	Domestic				1		
	Total				1		
ECONOMICS	Domestic	14	15	40	39	30	24
	International	15	11	18	40	45	42
	Total	29	26	58	79	75	66
PSYCHOLOGY	Domestic	10	10	21	21	34	46
	International	1	2	11	13	14	18
	Total	11	12	32	34	48	64
SOCIOLOGY	Domestic		1		1	2	5
	International		3	3	2	1	1
	Total		4	3	3	3	6
ALL SUBJECTS		40	42	94	129	141	156

Minors in Management for Students in other Faculties

The change in the BMgt into a 4-year program also gave us better opportunities to offer minors in management to other Faculties, because of altered capacities in some courses. In 2018 we introduced a minor in management for students in the School of Engineering, and even more recently we introduced a minor in management for students from other Faculties on the Okanagan campus:

Management Minors for Students based in other Faculties

Faculty of Arts and Social Sciences: Bachelor of Arts

Students may earn a Minor in Management by completing 30 credits as follows:

- 6 credits of core courses: MGMT 100, MGMT 110
- 6 credits from: MGMT 201, MGMT 202, MGMT 220, MGMT 230, MGMT 250, MGMT 290
- 18 credits of MGMT courses at the 300- and 400-level

Students might encounter difficulty fitting the courses for the Minor into their timetable; careful planning is essential, and completion of the Minor program may necessitate an additional term beyond that required to complete the B.A. degree alone.

Faculty of Creative and Critical Studies: Bachelor of Arts

As for the Faculty of Arts and Social Sciences Bachelor of Arts (above)

Faculty of Science: Bachelor of Science

As for the Faculty of Arts and Social Sciences Bachelor of Arts (above)

School of Engineering: Bachelor of Applied Science Program

Students desiring a stronger foundation in management and/or entrepreneurship are encouraged to consider the Minor in Management. Upon successful completion of this minor program, the notation "Minor in Management" will be placed on the student's transcript.

Enrolment in the program is limited. Applications for admission must be made to the Engineering Advising Office by May 31.

For an application to be considered, the student must be eligible for at least second year standing in the School of Engineering with a sessional average of at least 75% in the previous academic year. Meeting the stated minimum requirements does not guarantee admission into the minor. Admission will be based on GPA in conjunction with a statement of intent to be submitted at the time of application.

The minor consists of 21 credits:

- 3 credits: MGMT 100
- 18 credits: 400-level MGMT Courses (Prerequisite Courses may be required but will not count toward the 18 credits)
- Up to one MGMT course MAY be counted toward the B.A.Sc. technical elective requirement upon approval from the program coordinator.

The number of students taking Minors in Management from other Faculties is shown in Table B10.

Table B10 Number of Students taking a Minor in Management offered by the Faculty of Management, by Student Home Degree Program, and by Domestic or International Student

Degree Program	Status	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Bachelor of Arts	Domestic						1
	International						3
Bachelor of Applied Science	Domestic			12	20	28	25
	International			3	9	6	9
TOTAL				15	29	34	38

Students from other Faculties taking Faculty of Management Courses

The total number of students outside the BMgt taking Faculty of Management undergraduate courses is shown in the Table B11. In our 100 and 200 level courses, in 2014 we had a combined enrolment outside of BMgt students of about 230. By 2021 that number was a fraction over 500. In our 300 and 400 level courses, in 2014 we had a combined enrolment outside of BMgt students of under 20. By 2021 that number was 75. During the pandemic, prerequisites for some of our courses were reduced or eliminated, to enable access for students across campus in the face of reduced availability of learning experiences.

Table B11 BMgt Course Enrolment by Students in the Faculty of Management, or in another Faculty

Course Year Level	In/Out of Management	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
100	In Faculty	203	196	264	470	545	556	533	539
	Out of Faculty	144	154	112	218	301	331	420	448
200	In Faculty	198	188	208	110	1,283	1,617	1,713	1,623
	Out of Faculty	90	89	65	30	3	47	37	60
300	In Faculty	2,083	2,121	1,710	2,053	2,377	695	1,054	1,064
	Out of Faculty	4	4	7		8	8	5	12
400	In Faculty	1,736	1,335	1,393	1,246	1,351	2,159	1,654	1,863
	Out of Faculty	12	20	8	30	42	33	36	63
Total		4,470	4,107	3,767	4,157	5,910	5,446	5,452	5,672

Course grades

The distribution of grades across the Faculty's undergraduate courses is shown in Table B12.

Table B12 Course Letter grade Distributions for Faculty of Management Undergraduate Courses

Course Letter Grade	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
A+	7%	9%	6%	9%	12%	10%
A	15%	13%	14%	18%	20%	18%
A-	22%	22%	23%	24%	23%	22%
B+	16%	17%	17%	15%	14%	13%
B	15%	14%	14%	12%	10%	12%
B-	11%	10%	11%	8%	7%	9%
C+	5%	5%	7%	6%	5%	6%
C	3%	3%	4%	3%	3%	4%
C-	2%	2%	2%	2%	2%	3%
D	1%	1%	1%	1%	2%	2%
F	2%	2%	2%	2%	2%	2%

Student advising

As the Bachelor of Management program has grown, the Faculty has added additional staff resources in an effort to meet the needs of a diverse and growing undergraduate student body. In 2017, an Academic and Career Advisor was established, jointly appointed in the Faculty of Management and in Academic and Career Advising. The person holding this role is considered to be both part of the staff complement in the Faculty, and in the Advising office. She routinely participates in meetings in both units, and acts as a conduit of information to keep everyone informed of any adjustments to processes or procedures.

This arrangement appears to serve BMgt students well, as all Advisors are kept apprised of how to respond to routine queries from BMgt students, thus many BMgt students do not have to wait to speak to a specialist Advisor, and can access informed advising services relatively quickly. Additionally, when needed, a Management specialist Advisor is nearby within the Advising office to see to complex cases that require a closer connection to administrators in the Faculty.

The arrangement also benefits the Faculty, in the form of a personal connection with the Advising Office when it is needed. Because colleagues in the Faculty have a better understanding of common questions and concerns raised by students seeking Advising services, we can be proactive in creating pathways for students that might benefit their degree progression, and that might also enhance their UBC experience. Through this connection with Advising, the Faculty also benefits from learning about how other Faculties approach exceptional challenges that students might face, and can utilize that knowledge in future decision-making.

Career supports

The Faculty has been seeking to better understand and align career offerings and activities with student's interests and priorities, starting with a BMgt survey conducted in 2021. 193 students responded, spread quite evenly across all four years of the program, the vast majority (79%) then residing in Kelowna, and only 14% outside of British Columbia. They were asked to rank their interest in learning more about a number of particular topics on a scale of 1 to 7, 1 being the highest interest, and 7 the lowest. Their responses are summarised in Table B13.

Table B13 Interest in Learning about Particular Topics, 1 being Highest and 7 Lowest, Per Cent and Count of the 147 Respondents to this Question, Ranked by Mean Score

Mean score *	Topic	1	2	3	4	5	6	7
2.95	Developing a professional portfolio	29% 43	20% 29	14% 20	15% 22	12% 17	8% 12	3% 4
3.59	Resume writing and interview skills	14% 21	24% 35	19% 28	12% 17	10% 14	6% 9	16% 23
3.97	Virtual event networking tips	20% 29	7% 11	12% 18	19% 28	13% 19	16% 23	13% 19
3.95	Excel training	16% 23	16% 24	12% 18	13% 19	14% 20	14% 21	15% 22
3.95	Utilizing LinkedIn to grow your professional network	10% 14	13% 19	22% 32	16% 24	18% 27	11% 16	10% 15
4.71	Time and calendar management	7% 10	11% 16	12% 18	10% 15	16% 23	23% 34	21% 31
4.88	Creating captivating presentations	5% 7	9% 13	9% 13	15% 22	18% 27	22% 32	22% 33

* A lower mean score suggests higher interest

The students were also asked about unlisted topics that they might be interested in, and they identified, for example: entrepreneurship programs, team participation tips, video presentation skills, and channels for finding internships.

We have also been collaborating across campus with units such as the newly merged Advising and Career Development, a central student support unit. In 2021-2022, we co-hosted the following activities with Advising and Career Development:

- Career Connections - online career speaker events (Appendix B7)
 - Careers in the Health Sector – Interior Health
 - Careers in Finance – TD Bank Group Commercial Banking
 - Careers in Management, Sales – Enterprise Holdings
- Job search strategy workshops - one in person, and one online

We also collaborated with the Management Student Association (MSA) on suitable career activities, and in 2021-2022 offered the following:

- Excel workshops to assist students in developing critical skills

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 (<https://www.msaubco.ca/>). 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 nationwide network providing academic and professional development opportunities. The Faculty of Management offers dedicated mentoring support to the MSA via multiple connections with staff and an instructor.

The student-run JDC-West team participates in a three-day business competition bringing together western Canadian business schools, competing in academic, debate, sport, and social areas (<https://www.facebook.com/UBCOJDCWEST/>). As the competition provides a robust experience for students, the Faculty of Management offers dedicated instructional support, as well as funding, for the JDC-West team.

Undergraduate research

See the discussion of undergraduate research awards in Section E, Research.

Community engagement

See the discussion in Section F, Community Engagement

Challenges, and opportunities – Bachelor of Management

- Communicating the distinctiveness of the Bachelor of Management, Faculty, and Okanagan campus to prospective students in Canada and abroad can be problematic. The Faculty has a good and close working relationship with the University Recruitment and Student Admissions Office, and together we recognise that this challenge requires long-run commitment, building our reputation over time.

- Growth in student numbers, coupled with budget and space constraints, challenges the prospects of intimate learning environments, requiring purposive strategies to foster engagement and cohesiveness across students, faculty and staff. Initiatives such as the working group on online delivery (Appendix B6) are critical in this regard. More generally, such initiatives are pertinent to enhancing student learning experiences. That is a matter warranting ongoing attention.
- Enriching the undergraduate program with experiential learning opportunities can require significant energy and commitment. 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 we explore ways of further mobilising cross-border relationships to develop international opportunities for students. Similar challenges are faced by units across campus. There are opportunities for resources to be used more effectively by enhancing collaboration and coordination across organisational boundaries.
- The introduction of minors in management that are linked to the Bachelor of Management has been strongly welcomed across campus, and the minors are expected to grow significantly.
- The BMgt is structured around business functions, draws upon experiences with such general programs elsewhere in North America, and looks to opportunities from being located in the Okanagan. There is still significant scope to build on this agenda, and such distinctiveness, by complementing the BMgt and its minors with, for example, innovative certificate programs for undergraduates, master programs, and outreach education.
- An in-depth review of the BMgt curriculum, with consideration of how it might simultaneously enhance the quality of student learning, and be delivered more efficiently, could simultaneously improve the quality of the program and its associated minors. It could also release resources for investment in complementary certificate, master, and outreach programs.

C. GRADUATE STUDIES

Faculty of Management involvement in graduate programming has two facets. First, as a participant in the Interdisciplinary Graduate Studies Master and PhD programs, research-based degrees administered by the College of Graduate Studies. Second, as sponsoring Faculty of two Master of Management programs; one a very recently introduced dual degree and the other a post-experience program. Both are course-based graduate degrees, and they share the same curriculum. Both are administered with the involvement of colleagues across the Okanagan campus – delivered and operated through SE-Change, an initiative of colleagues from across UBC that is presently administered as a laboratory by the Faculty of Management (as described in further detail in Section A, Organising Ourselves).

The course-based Master programs are cutting-edge for the campus, innovative in delivery and approach. For example, the post-experience program is at the forefront of developing blended, online learning environments, and at delivering a program by weaving courses together through focal topics, rather than treating courses as separable, sequential components. The Master of Management is the first, and so far, only Dual Degree at the Okanagan campus.

Interdisciplinary Graduate Studies

Participation in strong graduate research programs is an important aspect of a thriving research environment. The small size of the Faculty of Management limits our ability to offer an independent program at appropriate quality, given other commitments. Hence, the Faculty provides important opportunities by maintaining an ongoing collaboration with other programs.

Interdisciplinary Graduate Studies (IGS) offers research-based programs that are administered by the College of Graduate Studies at UBC's Okanagan campus (<https://gradstudies.ok.ubc.ca/igs/>). The programs provide students with the opportunity to pursue graduate studies across disciplinary boundaries, allowing for both inter-Faculty and inter-campus arrangements for supervision and courses. Faculty in Management participate in the programs as theme members, contributors to courses, and as supervisors. The College of Graduate Studies is responsible for overseeing recruitment to these programs, and all aspects of the student experience.

The number of students enrolled in the Interdisciplinary Graduate Studies Master and PhD programs, and who have a supervisor based in the Faculty of Management, is shown in Table C1.

Table C1 Number of Students Enrolled in Interdisciplinary Graduate Studies Master and PhD programs, and with a Faculty of Management Supervisor, headcount, 2016-2022

		2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
MA	Domestic	1			1	1	2
	International	1	1				
MSc	Domestic						
	International						1
PHD	Domestic	5	4	4	3	3	4
	International	3	2	1	1	1	1
Total		10	7	5	5	5	8

Dual Degree Master of Management

The interdisciplinary Dual Degree Master of Management was approved by the Okanagan Senate in 2021, and is about to begin active student recruitment. It was developed and brought forward by a cross-campus working group, which was itself rooted in a request from the Okanagan campus Provost and Vice-Principal Academic in 2017 regarding cross-campus, cross-Faculty programming, as described in Section A. The working group that brought forward the Dual Degree comprised participants from the Faculties of Arts and Social Sciences, Creative and Critical Studies, Heath and Social Development, Management, and Sciences, as well as Indigenous Programs and Services, and Student Recruitment and Advising. The program is being administered with the involvement of colleagues across the Okanagan campus, consistent with its origins, interdisciplinarity, and epistemological breadth - it is delivered and operated through SE-Change, an initiative of colleagues from across UBC that is presently administered as a laboratory by the Faculty of Management.

The Dual Degree is an accelerated program enabling students to earn both a UBC Bachelor and a Master of Management degree in 4.5 years (<https://sechangelab.ubc.ca/programs/dual-degree-master-of-management/>). Details of the program are provided in Appendix C1. Participating first-year through fourth-year undergraduate students are required to take two courses at some point in their undergraduate studies, plus two week-long intensive workshops. The required courses are SECH 100 (or its equivalent, MGMT 100), and SECH 110 (or its equivalent, MGMT 110) - course descriptions are provided in Appendix C2. Upon completion of their undergraduate degree, students move immediately into a 35-week term of hybrid online and in-person graduate-level courses at UBC's Okanagan campus.

Learning outcomes

The program outcomes are as follows:

1. Identify and critically reflect on norms, values, and knowledge practices that define the various modes of knowing and disciplinary traditions of the university.
2. Apply understanding of these various modes of knowing and disciplinary traditions to identify and frame challenges and problems related to the program pillars (i.e., organizational behaviour, social change, community development, global context, and the empowerment of individuals).
3. Use reason and evidence, and sense and sensibility, to understand and manage complex environments and situations with respect to the program pillars.
4. Use communication and organisational solutions that take diverse and different perspectives into account, based on understanding and respect.
5. Critically assess, synthesize, and mobilize knowledge relating to management challenges in their respective fields.

Course learning outcomes are provided in Appendix C3.

Post-experience Master of Management

The current format of the post-experience Master of Management began student intake in 2017 (<https://sechangelab.ubc.ca/programs/post-experience-master-of-management/>). Prior to then, there had been a Master of Management in the Faculty that was essentially a condensed version of parts of the Bachelor of Management, delivered to students full time over 9 months, targeted at very recent non-BMgt graduates. That program experienced limited success, and, 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 into a 25-month, part-time, blended-learning program for working professionals.

The revisions were a response to a number of needs, not least accessibility for fully employed prospective students. The current post-experience Master of Management allows people who are fully employed 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 a two-week in-residence in each June/July for three consecutive summers. The program was also reframed to address the need for graduate-level education that aims to broaden perspectives, and to 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 the desirability of interdisciplinary, community-based experiential learning, and collaboration - peer learning, team-teaching, and working across UBC Faculties, as well as international universities. For example, we have been developing a close partnership with Orkestra – Basque Institute of Competitiveness over the last 10 years. As part of that initiative, colleagues from Orkestra have participated in delivery of the post-experience Master of Management since the first cohort, in 2017. The 2023 in-residence will be held over two weeks in June/July in San Sebastián, Spain, in collaboration with Orkestra.

When the Dual Degree Master of Management was introduced, administration of the post-experience Master of Management was brought alongside it, into SE-Change. There were two main reasons. First, the post-experience Master of Management shares a curriculum with the Dual Degree Master of Management that implies significant overlap across the programs, not least, when they are seen as elements in a portfolio of activities. Second, the post-experience Master of Management has always been delivered by colleagues on campus who are participants in SE-Change, as well through contributions from regional and international partners associated with SE-Change.

Appendix C4 presents the Academic Calendar program overview, and course descriptions. New cohorts have started in 2017, 2020, and 2022. Student numbers are shown in Table C1. The gender distribution is approximately 50/50, and all students have been domestic.

Table C1 Post-Experience Master of Management Student Headcount, Cohorts 1 to 3

2017/18	2018/19	2019/20	2020/21	2021/22
21	21	6	4*	9

* Two students withdrew from the second cohort. They rejoined in the third cohort.

Responsibility for recruiting to course-based graduate programs at UBC lies with the offering Faculty. A first cohort of 21 reflected our sustained and intensive recruitments efforts, including, in 2016, the running of a weekend “pilot” of the Master of Management experience for prospective students and applicants. When delivering the program with the first cohort, we found that our student recruitment resources for future cohorts were thinly stretched, in part because we were giving so much attention to the delivery. Our own learning curve for such an innovative program was steep, for example when it came to managing hybrid formats; ensuring student engagement, with each other and with ourselves, when they were working online and without the intensity of in-residencies; and maintaining coherence across educators as a collegial group responsible for program delivery. Hence attention was diverted from recruitment efforts, and the second cohort was small.

The number in the current cohort has picked up modestly, notwithstanding the recruitment process being hindered by the consequences of COVID-19. Partly, the hindrance was because prospective applicants for such programs often need a reasonably long lead-time to position themselves for such an intense commitment in their lives, bearing in mind the need to balance study with work and other commitments. COVID-19 has disrupted such planning, and increased uncertainties. Partly, it was because, over the last two years, as a Faculty we have been especially committed to all of the students that were already studying with us – undergraduates and graduates, those taking our courses and those taking our programs, students on the Bachelor of Management and those on the Master of Management. That is where we prioritised our time, energy, and resources.

Recruitment planning for a cohort starting in 2025 is currently under way, and we are exploring how to reach more potential applicants. The prospect of recruiting international students is high on our agenda, in part because it could bring a more diverse set of experiences into the program, enhancing the learning experience for all participants.

We maintain close contact with students who have taken the program, and their informal feedback suggests that they highly appreciate what is being offered, and recognise that it is education not readily available elsewhere. They are strongly committed to supporting the program going forward. Their enthusiasm is illustrated in Appendix C5, which provides an indication of the interests and aspirations of post-experience Master of Management students by reproducing some stories about particular individuals.

Some key characteristics of the program are described in Appendix C6. They include:

- We study management in the context of social and economic change, and of public interests. We recognise the importance of understanding local and global contexts, and of power and empowerment.

- We emphasise and practice inquiry – what it means and entails. The program is especially concerned with learning how to identify and address key management challenges – students study how to explore the challenges that matter to them, and others.
- We explore voice in organising, managing and leading social and economic change – critical opinions, and varied ways of exploring, articulating and communicating those opinions.
- We encourage students to be imaginative, and to challenge boundaries between theory and practice – to be inspired to link theory to their own practice, and to be part of the change happening around them.
- Students consider different worldviews to learn about various ways of seeing and experiencing the world, and appreciate plural perspectives on knowing and knowledge. Our intention is that they develop an understanding of the inter-relations between different forms of knowing and knowledge, privilege, and power.
- As the program progresses, we aim to enable students to refine their own approaches to management, and to learn to respect, critically appreciate and build on the knowledge of others from different disciplinary traditions, so as to enhance their own awareness, understanding, knowledge and practice.
- We aim to nurture the capacities of students to be bold in their thinking and action – to be critical, autonomous and radical; to identify new ways of doing and being; to influence established systems and processes; to address emerging social and economic issues/challenges; to realize change for the better.
- We create educational spaces for dialogue, questioning and debate with policy-makers, entrepreneurs, and community leaders, among others.
- We aim to provide participants with safe spaces (inspired by notions of liminal space, and backstage space) characterised by: listening; developing trust and personal relationships; feeling comfortable with uncertainty, disagreement and difference; understanding and managing of feelings of discomfort and self-doubt to achieve confidence; recognizing and addressing personal bias; testing; challenging mindsets and attitudes; realizing change
- Students learn with an interdisciplinary network of scholars and practitioners from across UBC and around the world.
- Our intention is that the first of the three in-residences in the program for each cohort will be held in the Okanagan, and subsequent in-residences are likely to be held in other parts of the world (as is the case with the current cohort, whose second in-residence will be in San Sebastián, Spain).

Advising and supports

From the moment students express an interest in the post-experience Master of Management, we aim to engage with them very closely - to be as supportive as possible when they are making their decisions. We see this personalised approach as part of our recruitment efforts. For students who take the program, we recognise that part-time study whilst balancing work and other commitments can be extremely challenging. As faculty and staff, we do our utmost to make ourselves available to support the students. We are aware that there are times when they might find the program complex, difficult, and possibly unsettling. Always, faculty and staff aim to be there to support each student's learning journey, in a safe environment where there is the space to transition to new ways of being and doing.

Community engagement

See the discussion in Section F, Community Engagement.

Challenges, and opportunities – graduate studies

- Given the significance of graduate research programs for a thriving research environment, the absence of programs squarely focused on particular research agendas can be difficult. Interdisciplinarity as such is not the drawback, but the Interdisciplinary Graduate Studies programs can be problematic in terms of their themes leaving some faculty with a sense that they have no opportunities to participate (<https://gradstudies.ok.ubc.ca/igs/>), and the way they are organised leaving some faculty feeling excluded.
- Many UBC internal supports do not apply directly to the Master of Management programs. Because they are at the cutting-edge of UBC experience, they do not follow typical formats on either the Okanagan or the Vancouver campus. This includes tasks such as recruiting students, promoting and marketing to potential applicants, collecting applications, offering admission, collecting tuition deposits, assessing tuition correctly, establishing scholarships, course scheduling, and engaging instructors from across the university, and at partner universities. Additionally, the interwoven nature of MM courses and collaborative style of instructor contributions limits the ability to collect Student Evaluation of Instruction (SEI) data. SE-Change offers new opportunities and solutions in those regards, and, as challenges arise, many people across UBC are eager to find creative solutions.
- The ethos of both versions of the Master of Management programs has diversity and collaboration amongst students at its heart. There are corresponding opportunities because they can appeal to non-traditional students, including Indigenous students, and students from diverse locations, as well as those who often have extensive travel commitments as an integral aspect of their work.
- Reaching potential students for the post-experience Master of Management continues to require the hands-on involvement of faculty and staff closely associated with the program, to establish the program's distinctive characteristics from the outset. It also needs specialist expertise, which will need to be hired. Alumni have expressed strong commitment to the program, given their appreciation of their own learning experiences, thus a desire to work with us on student recruitment. Opportunities also exist from the potential to work more closely with international partners, such as Orkestra, and to learn more about recruitment possibilities in different parts of the world. The introduction of new activities, such as the Dual Degree Master of Management, can give rise to economies of scale and scope. For instance, work with international partners to enable their undergraduate students to access the Dual Degree, might yield opportunities to promote the possibilities of the post-experience program.

D. INTERDISCIPLINARY CO-OP EDUCATION

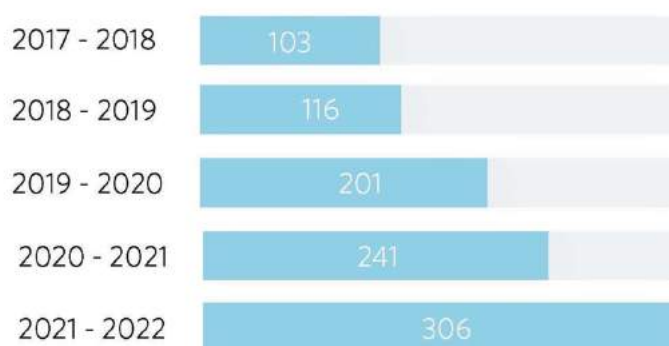
In 2016, we opened our Faculty of Management co-op program (which was nationally accredited through Cooperative Education and Work Integrated Learning Canada (CEWIL Canada), formerly the Canadian Association for Co-operative Education (CAFCE) to multiple Faculties across the Okanagan campus, through a formal agreement amongst Okanagan deans. The resulting Interdisciplinary Co-op Education program is open to undergraduate students in arts, fine arts, human kinetics, management, media studies, sciences, and social sciences, spanning the Faculties of Arts and Social Sciences, Creative and Critical Studies, Health and Exercise Sciences, Management, and Science (<https://sechangelab.ubc.ca/programs/interdisciplinary-co-op/>).

The Faculty of Management has continued to take the lead responsibility for administering Interdisciplinary Co-op Education – it is the “home” Faculty for co-op staff, and the Faculty of Management Dean is currently the program’s lead Dean. Within the Faculty, administration of the program was brought into the SE-Change laboratory in 2020. That is because the program is for students whose undergraduate degree is in numerous sponsoring Faculties across the Okanagan campus; and because SE-Change, as described in Section A, is intended to provide space and resources for faculty and staff from across UBC campuses to be innovative in research, programming and associated public engagement in the interdisciplinary study of social and economic change, without favouring any one Faculty.

Participating students

During the annual fall application period, in 2021-2022 there were 249 applications, of which 229 were accepted. This follows a period of continued upward rise – there were 175 students accepted in 2019-2020, and 207 in 2020-2021. The total number of work terms completed each academic year has also continued to rise, ever since Interdisciplinary Co-op Education was introduced (Table D1). In 2021-2022 it stood at 306, nearly three times what it was in 2017-2018.

Table D1 Interdisciplinary Co-op Education, Total Work Terms, by Academic Year, 2017-2022



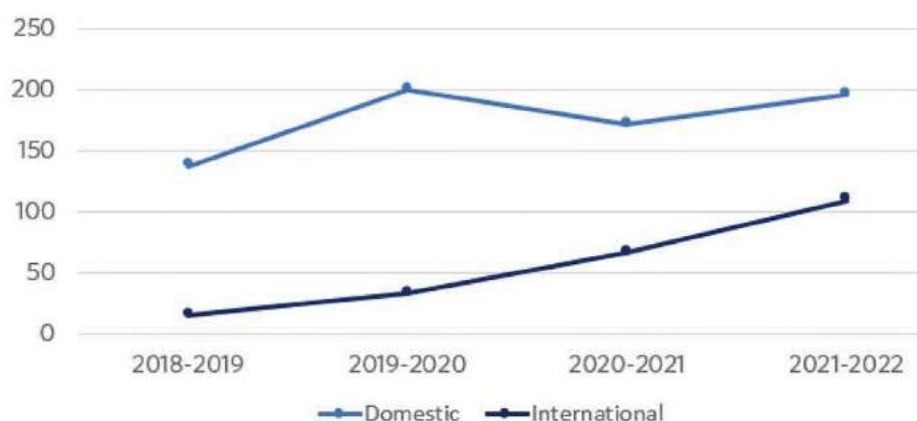
Bachelor of Management students continue to be very active in the program. In 2021-2022, BMgt students completed 77 co-op work terms, an increase of about one third from the previous year, and about one quarter of all work terms in 2021-2022 (Table D2).

Table D2 Interdisciplinary Co-op Education, Total Work Terms, by Faculty, and by Academic Year, 2019-2022

Faculty	2019-2020 Work Terms	2020-2021 Work Terms	2021-2022 Work Terms	% Change (2020-21 to 2021-22)
Arts	25	33	42	27.3%
Fine Arts	0	3	0	-100%
Management	46	58	77	32.8%
Human Kinetics	11	11	14	27.3%
Science	119	133	173	30.1%
Media Studies	0	3	0	-100%
Totals	201	241	306	27.0%

We have made deliberate efforts to work with international students, and with community partners, to enable wider access to co-op education. The number of international students participating has significantly increased over recent years. By 2021-2022, completed work terms by international students was 35% of the total, up from 27% a year earlier (Table D3).

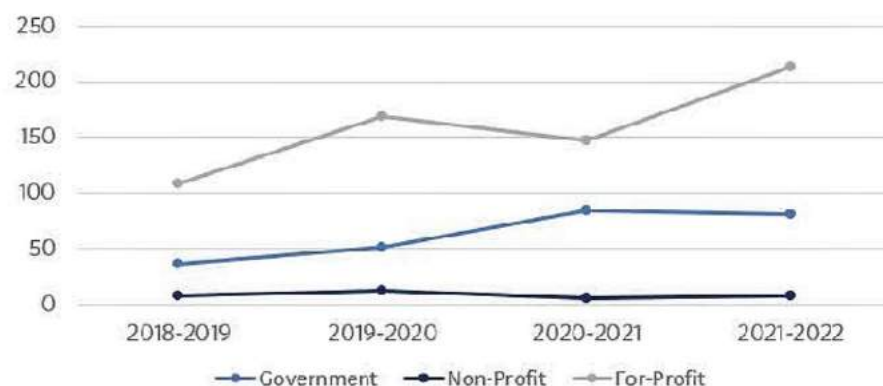
Table D3 Interdisciplinary Co-op Education, Total Work Terms, by Domestic and International Students, and by Academic Year, 2018-2022



Participating community partners

The vast majority of community partners providing work experiences for students are within British Columbia, with 14% in 2021-2022 outside the province. The partners were spread across the for-profit, non-profit, and government sectors (Table D4).

Table D4 Interdisciplinary Co-op Education, Total Work Terms, by Employer Sector, and by Academic Year, 2018-2022



* Government is inclusive of municipal, provincial and federal government and agencies.

Program developments

We have taken a number of initiatives recently to explore ways to enhance the experience for students and community partners participating in the Interdisciplinary Co-op Education program, and to increase accessibility.

With support and funding from the province, staff in the Interdisciplinary Co-op Education office have collaborated on three specific initiatives since 2019:

- Engagement of regionally-based small and medium sized organizations in applied learning experiences such as co-op education, in conjunction with two partners in the province, Thompson Rivers University (TRU), and University of Northern British Columbia (UNBC). As part of the project, a UBC Okanagan Co-op Mapping was completed, in December 2020/January 2021. The aim was to understand the landscape and dynamics of student disciplines, active industries, and employer engagement through data analytics, so as to inform the planning for future engagements. The mapping addressed co-op student hiring trends for Interdisciplinary Co-op Education students, looking at shifts year over year by industry, discipline, and business segment, and providing a sense of what industries are partnering with the program, with a view to exploring where promotion could be done to engage partners in the future. The overview of findings is presented in Appendix D1.
- Identification of barriers to engagement in work-integrated learning such as co-op education by Indigenous students across both campuses of UBC, with additional funding to pilot a wraparound service to Indigenous students, and to strengthen relationships with Indigenous communities and organizations. Appendix D2 presents the executive summary of the report findings, including challenges and recommendations.
- Through the integration of teaching and learning technology, we collaborated on the development of a UBC system-wide approach to co-op pre-employment and career readiness curriculum.

Piloting a sector specific wine coop specialisation

Colleagues across SE-Change have collaborated on developing a pilot for a Wine Sector Co-op Specialisation, as part of the Interdisciplinary Co-op Education program. The explanatory document introducing the initiative is reproduced in Appendix D3.

The aims include:

- To create a richer learning experience for students, and one that is linked explicitly to their undergraduate studies in innovative ways
- To respond to the desire of the British Columbia wine sector for more specialized and knowledgeable students.

The specialisation is led from the Social and Economic Change Laboratory (SE-Change) by the Interdisciplinary Co-op Education program office, with collaboration and contribution from the UBC Wine Research Centre. It is available to all UBC undergraduate students at the Okanagan and Vancouver campuses, who are currently eligible for existing UBC Co-op Education Programs.

Key characteristics of the specialisation include:

- Students are required to complete a one-credit equivalent online course introducing the British Columbia wine sector. The course is intended to broaden students' understanding of:
 - The sector in its social, economic, and cultural context
 - The grape growing and winemaking process as a whole
 - Sustainability and environmental considerations.

The course is led by the UBC Wine Research Centre. Students completing the course receive a UBC non-credit letter of proficiency.

- During each term of wine co-op work experience, an academic tutor is assigned to each student, and they meet a minimum of two times per term. These touch-points aim to engage the student in reflection about their work environment, bearing in mind what they have learned in their degree courses.
- The introduction of a non-credit certificate is envisaged for those students successfully fulfilling all of the requirements of the entire Wine Sector Co-op Specialisation.

There is an ongoing evaluation of the specialisation. The aim is to have a holistic understanding of the design, delivery and development of the program, critically appreciating its evolution and the potential for such programs. A fundamental concern is with evaluating if and how the program creates value with and for various publics - most especially, students and industry. We are particularly interested in the interaction between academic knowledge and practice in various parts of the program, and the outcomes. A key deliverable will be a report with key findings and recommendations that will be shared amongst UBC colleagues leading and supporting the Wine Sector Co-op Specialization.

Our intention is to learn from our experiences with the Wine Sector Co-Op Specialisation, refine its form, curriculum, and delivery accordingly, and explore how we might be able to introduce similar specialisations in other sectors, for example, in the health sector.

Challenges, and opportunities – Interdisciplinary Co-op Education

- Interdisciplinary Co-op Education has grown rapidly in a relatively short period of time, yet it is largely organised in ways that are similar to those originally introduced for a program that was far smaller, and less complex. We are currently reviewing our organisational roles and responsibilities, structure, and processes, with a view to being more effective at organising, managing and leading co-op education. The aim is to enhance the experience for students and employers, and be able to identify, prioritise and address new opportunities.
- One factor in our early success with co-op education was the development of close relationships with community partners. That enabled us to ensure that students could have the best possible learning experience during a work term, and that employers had reasons to value the program. With rapid growth in recent years, those relationships have become more challenging to maintain and develop. One reason for our review of organisational roles and responsibilities, structure, and processes is to ensure close relationships underpin all that we do.
- As the program continues to grow, the capacity of the Okanagan economy to provide a sufficient number of quality work terms becomes strained. Developing relationships with community partners that are further afield is more resource intensive, but a challenge that we need to meet. Our diverse students would also benefit from our being able to open a wider set of experiences in which they could learn, not only locally but also province-wide, nationally, and internationally. One way that we plan to proceed in this respect, is to work more closely with our partner universities in other jurisdictions.
- We recognise a need to continue the develop access to Interdisciplinary Co-Op Education for international students, and for Indigenous students. The recommendations in the report on *Identifying Challenges, Creating Opportunities - Indigenous Students and Work-Integrated learning at UBC, 2020-2021* offer good building-blocks.
- The development of sector specialisations offers exciting prospects, and our intention is to learn from the opportunities provided by the pilot Wine Sector Co-op Specialisation. Our challenge is to reflect on the role of an introductory course as a way of preparing students for their work terms, and to become more effective at linking explicitly between undergraduate studies and work experiences. Our intention is to learn through, and from, the evaluation of the Wine Sector Co-op Specialisation.

E. RESEARCH

Our research sits at the nexus of the three main themes that emerged from *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.

The Faculty currently has 13 tenure-stream faculty members with active research programs. Researchers have diverse and wide-ranging interests and outputs. We have research strengths that include entrepreneurship (e.g. Chiasson, Fan, Marcolin), health (e.g. Ardestani-Jaafari, Chiasson, Davis, Li, Marcolin), logistics (e.g. Ardestani-Jaafari), marketing (e.g. Joy, Li, Zhu), public finance and political economy (e.g. Hickey), resilience and conflict (e.g. Culver), service industry employees (e.g. Walker), social innovation (e.g. Li), socio-economic development (e.g. Chiasson, Culver, Hickey, Sugden), stakeholder engagement and decision-making (e.g. Chiasson, Li, Sugden), sustainability (e.g. Pelletier), and technology and information systems (e.g. Chiasson, Marcolin, Zhu).

Notable achievements for the Faculty are, in 2021, our first faculty member funded by two tri-agencies,¹⁶ our first Principal's Research Chair (PRC),¹⁷ and our first campus Researcher of the Year, in Social Sciences and Humanities.¹⁸ In 2022, we had our second campus Researcher of the Year, this time in Health.¹⁹ With our strong focus on interdisciplinarity, the Faculty has also taken a leadership role in enabling research opportunities across campus - for example, with the development and leadership of the inter-campus Survive and Thrive Applied Research Initiative (UBC STAR),²⁰ and with the emergence of SE-Change.

An indication of the interests and outputs of faculty is provided by Appendix E1, a list of published journal articles, book chapters, books, and edited books between 2016 and 2022 compiled from a search of Google Scholar and publicly available CVs. The list is not necessarily complete for all of the publications of each cited author. It identifies over 170 publications in the 7-year period.

The interests and achievements of faculty are also shown in the stories about individual researchers and research projects in Appendix E2, and some of the stories about students working with faculty in Appendix B4.

We have been increasingly successful in earning research funding, which is reported by the number of projects and sources of funding in Table E1. The number of projects per year varied between 4 and 14 between 2013 and 2017, and since 2019 has steadily increased, to approximately 30 in each of the last two years. There was Tri-Council funding for more than 10 projects last year.

¹⁶ Jen Davis.

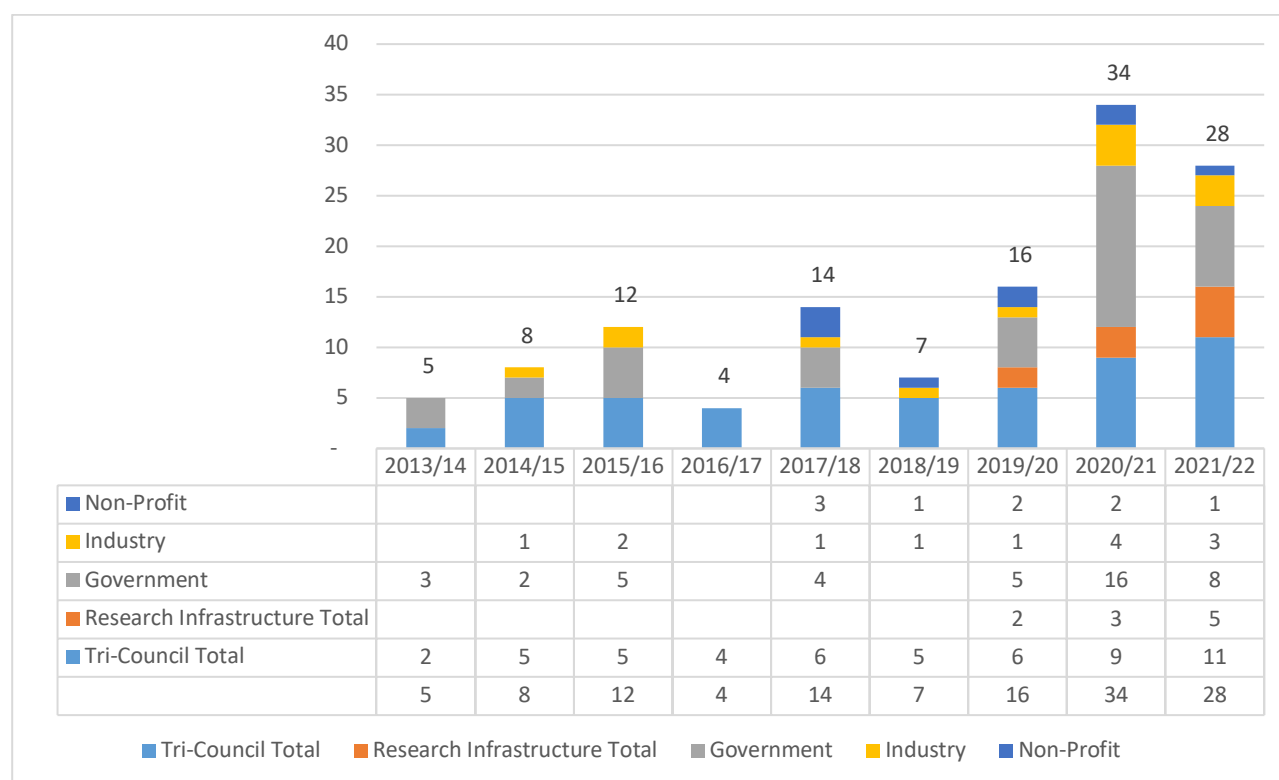
¹⁷ Eric Li.

¹⁸ Eric Li, Researcher of the Year in Social Sciences and Humanities.

¹⁹ Jen Davis, Researcher of the Year in Health.

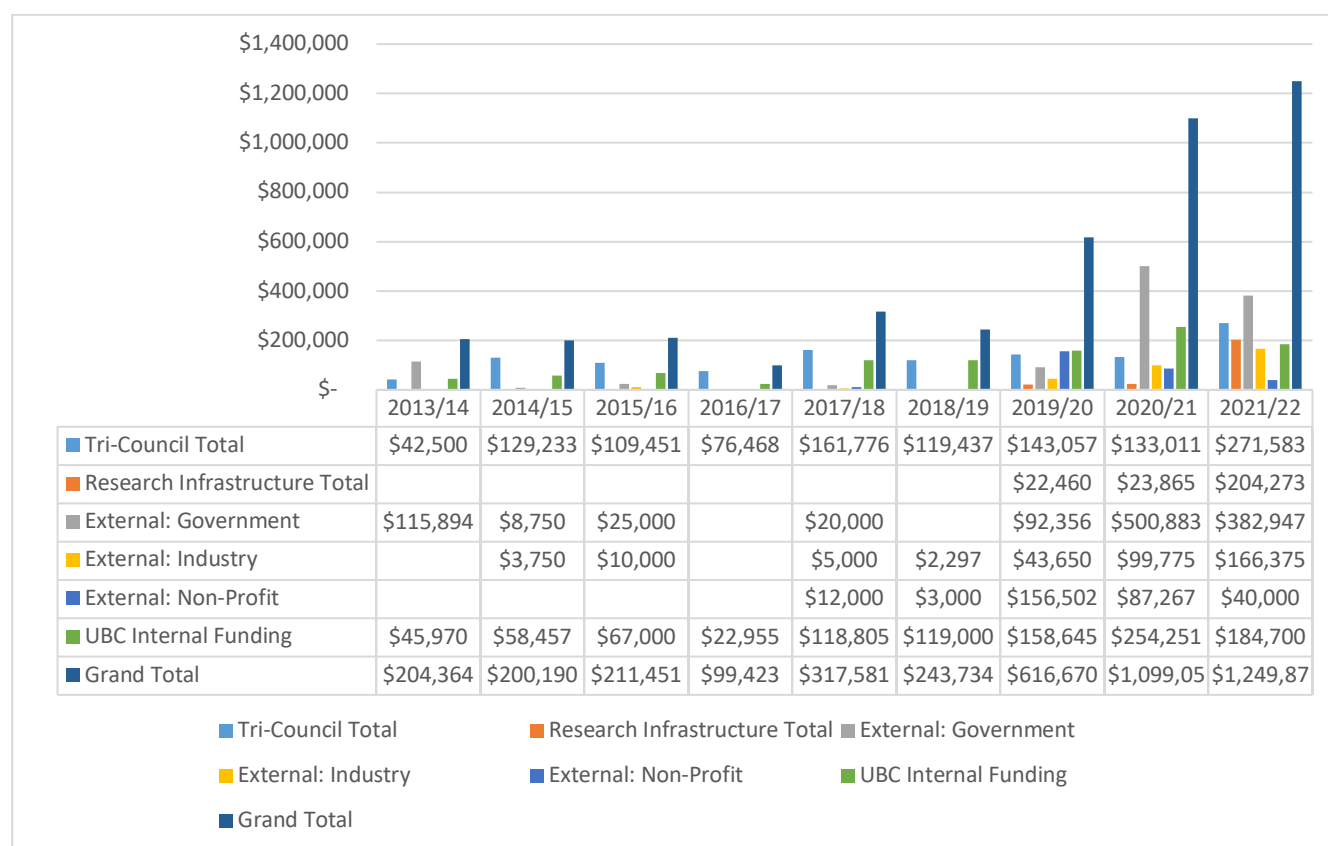
²⁰ <https://star.ubc.ca>. Keith Culver, the Faculty of Management Associate Dean, Regional Innovation Practice, is Director of STAR. The initiative was initially developed by a working group led by Dean Roger Sugden.

Table E1 Number of Faculty of Management Research Projects, by Source, 2013-2022



Research funding by dollar amount and source of funding is shown in Table E2. The total hovered around \$200,000 per annum in each of the years 2013 to 2016, and by 2019 had broken the half million-dollar point. By 2020, it surpassed one million.

Table E2 Faculty of Management Research Funding, \$s, by Source, 2013-2022



Our success rate in securing funding from submitted grants is high, as shown in Table E3.

Table E3 Faculty of Management Grant Applications, and Success Rate, 2015-2020

	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
Total grants submitted	5	16	11	16	14	N/A
Total grants received	3	9	11	6	12	N/A
Success rate %	60	56%	100%	38%	92%	N/A

Undergraduate research awards

Since 2017, the Faculty of Management has been partnering with UBC's International Student Initiative (ISI) to support international students to engage in research with faculty through the International Undergraduate Research Award (IURA). Funding for IURA comes from ISI. In 2020 we introduced a Management Undergraduate Research Award (MURA) to support all undergraduate

students enrolled in the Faculty of Management to engage in research. The terms of MURA followed those for IURA, with funding coming from the Faculty.

Interested students are required either to develop their own research project and present it for consideration to a faculty member who would be the research supervisor, or approach a faculty member involved in research that they find interesting, and work with that faculty member to develop a mutually beneficial project. Awards are selected on the merits of the proposed research, abilities of the student, and involvement of the faculty researcher. All MURA and IURA students present their research findings at a public symposium in the September following the project.

A flavour of the significance of the awards for student learning is suggested by the story about Bachelor of Management alumnus Patience Okuku in Appendix B4. He was an award recipient in 2018, working with supervisors from Management, and the Department of History and Sociology (Faculty of Arts and Social Sciences). The number of award recipients has varied between 3 and 8 students per year (Table E4).

Table E4 Number of Award Recipients, International Undergraduate Research Award (IURA), and Management Undergraduate Research Award (MURA), 2017 to 2022

<i>Year</i>	<i>IURA</i>	<i>MURA</i>
2017	4	
2018	3	
2019	3	
2020	4	4
2021	4	3
2022	3	

Thus far, two students receiving awards - Nithi Santhagunam and Somin Lee - have contributed to publications:

- Davis, J. C., Li, E. P. H., Butterfield, M. S., DiLabio, G. A., Santhagunam, N., & Marcolin, B. (2022). Are we failing female and racialized academics? A Canadian national survey examining the impacts of the COVID-19 pandemic on tenure and tenure-track faculty. *Gender, Work & Organization*, 29(3), 703–722. <https://doi.org/10.1111/gwao.12811>
- Li, E. P. H., Min, H. J., & Lee, S. (2020). Soft power and nation rebranding: The transformation of Korean national identity through cosmetic surgery tourism. *International Marketing Review*, 38(1), 141–162. <https://doi.org/10.1108/IMR-01-2019-0053>
- Santhagunam, S. N., Li, E. P. H., Buschert, K., & Davis, J. C. (2021). A theoretical framework to improve adherence among older adults to recommendations received at a falls prevention clinic: A narrative review. *Applied Nursing Research*, 62, 151493. <https://doi.org/10.1016/j.apnr.2021.151493>

Research support

The Okanagan campus has a research support system through the Office of the Vice-Principal and Associate Vice-President Research and Innovation.

The Faculty funds the Faculty of Management Librarian, who supports researchers in finding access to information resources, and we have our own research coordinator, the Senior Adviser-Research. While some larger natural and health science labs on the Okanagan campus have research managers, we were the first Faculty to have its own coordinator. This support has been 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 key roles of the Senior Adviser-Research include: to help to increase our success with research funding; to facilitate interdisciplinary research partnerships, both intra- and inter-campus, as well as local, national and international; to enhance undergraduate and graduate research opportunities; to help increase our research impact (academic, social, economic, cultural). The research coordinator also administers the base funding that we provide each research faculty member every year to support participation in conferences and other research expenses: each researcher has access to \$3500 per year for any research-related activities.

Challenges, and opportunities - research

- The size of the Faculty places an in-principle limit on the capacity for growth in research. For example, our research funding cannot reasonably be expected to keep growing. In itself that is not a problem, but in a university that can sometimes value research funding as a Faculty performance metric, it can be challenging.
- Faculty size also weakens our capacity for research mentorship, and impacts our research culture, notably because more experienced faculty are often overburdened with administrative duties, albeit we encourage faculty to develop their own support networks, across the campus and university, and internationally.
- There can be tension between teaching, service, community engagement, and research. The priority areas of *Aspire* around student learning, research excellence, and community engagement can present competing priorities for faculty, especially those who have yet to be tenured. It can be difficult for faculty to balance their efforts and outputs. We organise support staff roles to assist faculty as much as possible, but tensions can remain.
- An additional factor in the development of our research activities is limitations around graduate research programming on the Okanagan campus, bearing in mind that strong graduate programming influences the development and sustainability of a thriving research environment.
- As a subject area, management is critical to the strategic agenda of the campus, as reflected in the ways that our research is positioned with respect to the three main themes that emerged from *Aspire: Envisioning Our Future*.

F. COMMUNITY ENGAGEMENT

The Faculty prioritises community engagement in research and teaching. We take a holistic approach, emphasising the interaction and integration across research, teaching, and community engagement, rather than seeing each in their own silo.

We are actively involved in leading and engaging community-based research on a broad range of topics and disciplines. That is illustrated by our projects and outputs. Consider, for example, the story reproduced in Appendix E2 about the falls research of Jen Davis, collaborating with healthcare patients:

When it comes to her research, Dr. Davis's elderly subjects are more than mere participants. "We invite them to be formal members of our research team," she says. "They're patient partners that contribute to all aspects of the research process."

Dr. Davis expresses gratitude and praises these members of the team for being thoughtful, engaged and providing valuable insights. "With our research lens, we haven't necessarily had the perspective of individuals who have lived experience with receiving care for a fall." She goes on to say that adding this perspective has been beneficial from the research design phase through to interpreting their findings. "Our patient partners have told us they feel positive about having the opportunity to give back and pay it forward. They also enjoy the social aspect of being part of the research team."

Or the story about the work of Amir Ardestani-Jaafari, including his comments on a project with the Central Okanagan Community Food Bank that is being contributed to by a number of faculty colleagues:

The pandemic has raised several important operational questions for the Central Okanagan Community Food Bank in terms of inventory management and supplier uncertainty. There have been a number of disruptions on the supplier side; because of the pandemic there were fewer farm workers, so farms could not donate as much as they normally would to the food bank. In addition, COVID-19 has given a shock to suppliers.

At the same time, the food bank is experiencing an increased demand for their services, and there's also the challenge of matching families with supplies—a senior couple has much different needs than a young family with babies, for example. So how can we consider the preferences of clients when providing support? We have developed a mathematical model to address these questions and investigate the sources of uncertainty, so that they can be mitigated.

Or the story on working with the British Columbia wine sector, on wine territory identity:

Our group at UBC has been engaging with the wine industry since 2012 in the context of territorial development. Creating independent, safe learning environments to facilitate collective knowledge on a number of issues is a prominent feature of our work.

Most recently, we developed a four-step iterative process to explore BC's identity as a wine-producing territory. Those are understanding identity, identifying commonalities and differences, developing a shared narrative and sharing best practices. More than 50 wineries across BC participated through workshops, interviews and other conversations.

Discussions included themes such as terroir, authenticity, expression and narrative. Participants realized that there were commonalities to build on and differences to value. For example, a commonality stressed was the presence and importance of small family wineries and farms within as well as beyond the wine industry.

Or the story in which Eric Li acknowledges the role of community partners in his work, when recently named a member of the College of New Scholars, Artists and Scientists:

I am very fortunate to work with a wonderful group of colleagues, community partners and students to explore innovative solutions to important societal issues.

Consider also the story reproduced in Appendix B4 about the work of Bachelor of Management alumnus Patience Okuku, when he was a student co-supervised by Eric Li, from the Faculty of Management, and Bonar Buffam, from the Department of History and Sociology. His research was focused around the experiences of 20 intergenerational families, who were engaged in Kelowna and elsewhere.

Bachelor of Management

The Patience Okuku story is a reflection of the way that the Faculty has prioritised community engaged experiential learning in its design and delivery of the Bachelor of Management program, and the learning experiences for students. In developing and addressing experiential learning, we have focused 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*. Key examples of this are the final year BMgt Capstone course, the Live Case Challenge, and Entrepreneurship Bootcamp. We have also enabled Bachelor of Management students to access the campus Interdisciplinary Co-op Education, as well as contributing significantly to the managing and leading of that initiative, which is discussed in detail in Section D of this report.

Capstone

Our Capstone Service Learning and Consulting (MGMT 490) course partners a regionally based organization with undergraduate students, and provides consulting support to an operational challenge. It is the final graduating requirement for Bachelor of Management students, and gives students an opportunity to apply what they have learned during their program. Capstone involves more than fifty dedicated hours focused on a community partner challenge. Over a semester, students work in small groups to research, analyze and develop recommendations. The course offers both students and the organizations that participate, a unique opportunity to engage and learn from one another to solve real-time challenges.

Over the past few years, we have had approximately 25-35 projects each term, 60-70 projects per year (mostly partner-led, others thematic). A sense of the sorts of projects is provided in Appendix F1, and a video about Capstone is available here:

<https://www.youtube.com/watch?v=dtPabxKOYqA&t=69s>

Live Case Challenge

Another signature experiential learning activity has been our Live Case Challenge. Prior to COVID-19, when health restrictions interfered, the Faculty of Management, working with the sponsor Argus Properties Ltd., offered each year the Live Case Challenge for third-year Bachelor of Management students to work in teams, and address a ‘live’ management challenge faced by a community partner. The collaboration between the partner organization and over 200 BMgt students provided a unique opportunity, and the outcome has been a rich, experiential learning opportunity for the students, and meaningful solutions for the community partner.

Our community partners in Live Case Challenge over recent years have been as follows:

2019/2020	Patriot One Technologies
2018/2019	Telemark
2017/2018	Pro Builders Home Hardware
2016/2017	SunRype
2015/2016	City of Kelowna - Planning, Transportation and Infrastructure Departments

A story about students and Live Case Challenge is reproduced in Appendix F2, and a video about Live Case Challenge is available here:

<https://www.youtube.com/watch?v=VBjc0BmE5xI>

Entrepreneur Bootcamp

The bootcamps have taken place each year from 2013 to 2020, when they were suspended due to COVID-19. Our plan is to return a version of bootcamp in 2023 (under the auspices of SE-Change, bearing in mind the bootcamp's cross-campus, cross-Faculty nature). The bootcamps are a competition that gives students from across campus the opportunity to pitch their business idea to a panel of judges for the chance to win cash prizes that help them pursue their entrepreneurial ideas. They grow the number of students at UBC's Okanagan campus introduced to entrepreneurial practices, and increase interest in learning about starting an entrepreneurial organisation.

The backbone of the activity are professionals from the wider community – the real-world experience and mentorship provided by the judges drives students to develop. Previous Entrepreneur Bootcamp judges include:

- Representative, Odlum Brown Limited
- Shane Austin, Co-founder, Okanagan co+lab
- Barb Marcolin, Faculty of Management
- Mason Macklem, tveon.com
- Duane Thomson, President, Lake Country Heritage and Cultural Society
- Representative, Lake Country Health Planning Society
- Prashant Verma, Past Management Winner Sample Pitch: Fluid 3D Construction
- Cailan Libby, Past Engineering Winner Sample Pitch: Co-housing
- Brea Lake, CEO Accelerate Okanagan (*Sunday Only*)
- Sabine Weyand, Instructor, School of Engineering UBC Okanagan (*Matching Event*)
- Ken Chau, Professor, School of Engineering, UBC Okanagan (*Matching Event*)

The number of teams and students involved has grown significantly over the years (Table F1). Their programs of study have been in multiple Faculties, including Management, Science, and the School of Engineering.

Table F1 Involvement in Entrepreneurship Bootcamp, 2013-2020

	Number of teams	Number of students
2013	9	25 pitching 40 attending
2014	12	30 pitching 60 attending
2015	Max - 17	43 pitching 60 + attending
2016	17	45 pitching
2017	Max - 15	75 + attending
2018	Max - 15	65 + attending
2019	Max - 15	65 + attending
2022	Max - 15	65 +attending

Previous winners include:

2020	Charity Check
2019	Fluid Construction
2018	Boat Launch
2017	3E
2016	Third Dimension (rebranded from Luminous)
2015	FestFeed
2014	Adventure Bucket List

Post-experience Master of Management

A characteristic of the in-residences featured in the post-experience Master of Management is the learning opportunities from invited sessions with community partners, and the field visits that span, for example, heritage museums, food banks, municipalities, lumber mills, tech centres, and wineries.

Their significance for students is reflected in the story in Appendix C5 about Manik Dhir (from the first cohort of the MM):

Standing in Quail's Gate winery, with the warm Okanagan sun above, Manik and fellow MM students listened to owner Ben Stewart talk about the company's success as well as

challenges over three decades in the Okanagan region. The winery visit was part of the in-person intensive residential sessions for the MM degree, an essential program component that brings together the cohort with regional organizations to dig deep into management topic areas.

Manik lauds the MM program's inclusive focus and links to regional economic development in the Okanagan. The close connections with industry fostered by the Faculty of Management brought to life its promise of a 'living lab' for its students, one where Manik experienced the value of having time with leaders he might not have had otherwise.

The story continues:

what was perhaps most invaluable for Manik was the focused time talking with leaders and business owners. "The cherry on top," says Manik, "is having the chance to actually sit down and talk one-on-one with key leaders in industry and ask them, what challenges is your industry facing right now? And how do you plan on overcoming those challenges?"

Another key characteristic of the program is its emphasis on the Applied Project. The students inquire about an issue or a problem in a real-world context, and so on in ways that typically entail working with organisations and people in communities. Consider, for example, the story in Appendix C5 about June Lulua (from the second cohort of the MM):

For her Applied Project—a focal point of the MM program, in which students conduct a management inquiry into a contemporary socio-economic issue—June conducted a research project on pre-colonial governance practices in her Tsilhqot'in community.

"Indigenous leaders do want to incorporate Indigenous law into policy," she explains. "Every family has a different memory or different knowledge of historical governance, so having it in a research document is a way to bring together everyone's perspectives." The report is with the leadership of the First Nation, and has not been made public to the wider audience, but June hopes that it will help inform her community's transition to full self-governance.

Indigenous communities

We are conscious of the need to develop meaningful partnerships and collaborations with Indigenous communities - relationships based on respect, trust, and understanding, and on benefits for Indigenous communities. We avoid a box-ticking approach, and intentionally move one step at a time, aware that we have much to learn. Our aim is to foster conditions for the co-creation of curriculum, student support, and research that are relevant to Indigenous interests, and on the terms of Indigenous peoples.

The Faculty's approach is illustrated by our taking, and being involved in, a number of initiatives. For example:

- The Faculty, in co-operation with the Admissions office, established a "category 2" admissions pathway for self-declared Indigenous applicants to complement the Aboriginal Access Studies pathway and general admission pathway for the Bachelor of Management.
- The curriculum for the new Dual Degree Master of Management integrates Indigenous content with the help of Aboriginal Programs and Services. It is envisaged that awards will be made available to Aboriginal students who are interested in participating in the program.

- In delivery of the post-experience Master of Management, we systematically integrate presentations by invited speakers from Westbank First Nation’s Sncewips Heritage Museum, and field trips to Westbank First Nation’s community core. Cultural training is now a key aspect of the program.
- The Interdisciplinary Co-op program, in conjunction with Arts Co-op, Applied Science Co-op, Indigenous Programs and Services, First Nations House of Learning, and Centre for Student Involvement and Careers, hired an Indigenous Co-op Coordinator to support Indigenous student engagement in co-op, and to advance collaboration with a variety of internal and external stakeholders for stewarding relationships to assist with the creation of co-op education, and other forms of work-integrated learning opportunities with Indigenous communities and organizations. Funding was secured through the Ministry for Advanced Education and Skills Training – Co-op and Work Integrated Learning Initiative. The collaboration resulted in a report - Appendix D2 presents the executive summary of its report findings, including challenges and recommendations.
- In 2018, Indigenous artist Csetkwe Fourtier participated in workshops organised as part of a project exploring the identity of the British Columbia wine region. She was asked to witness, observe, and listen to the discussions, and to translate her individual interpretations in her own style, through her art, however she saw fit. Csetkwe worked at the workshops in real time, and shared her art with the participants. Her pieces are titled: “Grander than the Grand Canyon: kilawna”, “Underground: senpinkten”, “Siblings: n’kmip”, and “Sophisticated Systems: Kwantlen”. Since 2020, Csetkwe’s art from the workshops has been hanging in The Commons at UBC’s Okanagan campus.
- A project has just begun with Okanagan Nation Alliance (ONA) on an *Operations, Evaluation and Learning Framework* that would achieve objectives identified by ONA. The project includes a case study of the growth and successes of ONA, using an approach based on iterative conversations.

We are acutely aware that it would be ideal to recruit Indigenous scholars to guide, and help to develop, our activities, so that we can all fulfill our responsibilities. Funds have been set aside for this purpose but advice suggests it would likely be impossible to recruit Indigenous faculty successfully in our circumstances.

We are re-thinking the best approach. That seems likely to include participation in interdisciplinary, cross-campus initiatives that view Indigenous perspectives on organising, managing and leading social and economic activities as part of a wider set of concerns. Graduate intensives, and summer research workshops, are perhaps possible, taking advantage of the Okanagan as a good location for inviting groups of visiting Indigenous scholars – tenure stream, postdocs, and graduates - to work together for short periods of time. Such initiatives might be linked to graduate programming.

Challenges, and opportunities – community engagement

- Engaged relationship building requires significant investment in both time and resources. As a regionally-based campus, we must also avoid saturation of partners, which could cause fatigue. With both of these factors in mind, 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.
- When people engage with UBC and with the Faculty of Management, sometimes they do not recognize a difference in role between a program lead, faculty member, staff member, or even a student. Sometimes, there can be misunderstanding about roles across members of UBC. The result

can be problematic confusion. It suggests a need for greater clarity amongst ourselves and with community partners, and for more, and more careful, communication.

- As we plan for the further development of the Faculty, we see community-engaged experiential learning as a focal point. We have been reviewing the opportunities that we provide - that review needs to be completed, and followed through. In doing so, there are opportunities for synthesis, complementarity, and growth across experiential learning activities; for example, evolving a structure that would enable us better to identify where a capstone project leads to a co-op opportunity.
- Developing approaches to engaging with Indigenous communities, and re-thinking how to work with established and emerging Indigenous scholars, and Indigenous knowledge-keepers, are imperatives. In part this might include participation in interdisciplinary, cross-campus initiatives that view Indigenous perspectives on organising, managing and leading social and economic activities as part of a wider set of concerns. Embracing Indigenous perspectives and understanding on the terms of Indigenous peoples is especially problematic in the Bachelor of Management, where much remains to be achieved.
- There are ongoing possibilities to enhance our work with alumni, to open opportunities for students within the organizations where they work. This would allow the organizations to benefit from the inputs of our students, the students to gain valuable work and learning experience, and the UBC-alumni relationship to be deepened.

G. BUDGET

Campus drivers

The budget model for the Okanagan campus requires that each Faculty grows its enrolments. They are the principal source of revenue, and without revenue growth it is only a matter of time before a Faculty is in deficit. That is because Faculty costs necessarily increase. Salaries are the major item, and they inexorably rise due to the mandatory increases that a Faculty must incur, including payments for annual general wage increases (GWI), and merit and performance salary adjustment (PSA).

An implication of this scenario is the need for a Faculty to be clear which of its activities align with campus aspirations. The Faculty can then give them priority, and aim for a delivery that is not only meeting aspirations but also cost efficient. In doing so, the Faculty can stop, or scale back, other activities.

It is also critical that a Faculty allocates resources to develop new initiatives, so as to move closer to realising the vision and aspirations of the campus, whilst, if possible and subject to the academic mission, increasing revenue. Certainly, across all activities there is an expectation from campus leadership that a Faculty balances its costs and revenues, at least in the medium run. That must be achieved whilst enabling the research agenda to prosper, and in a manner suited to a leading research university, aspiring to be at the cutting-edge of knowledge and knowing.

Another factor is that, at UBC in the Okanagan, these budgetary forces play out on a campus where academic units tend to be small. In that circumstance, there can be advantages to collaboration across organisational boundaries so as to share administrative tasks, and costs, that are problematic for a small Faculty to bear. In certain subjects, the possibility for collaboration can also be an advantage for enhancing the quality of research and education. In those cases, the small size of the campus can be helpful, because it can enable people to relate to each other across disciplines, and other organisational boundaries.

It is with such factors uppermost in mind that the Faculty of Management has been organised, managed and led, and its budget allocated.

Management subject area

We have budgeted in the context of the management subject being critical to the aspirations of the Okanagan campus, as laid out in *Aspire: Envisioning Our Future*,²¹ and subsequently reinforced in UBC's strategic plan, *Shaping UBC's Next Century*.²² Management is a subject that provides significant opportunities for programming, research, and engagement with communities and publics, including programming that can yield revenues. The subject resonates with students and potential students, including those whose principal interest is in other subject areas and disciplines. It also resonates with people in communities, and who make up publics. The interest in management is wide-ranging, encompassing "business", and social and economic activity more generally. In the Okanagan, appreciating that breadth is critical to realising appropriate impact on regional development.

²¹ <https://dvc-new.cms.ok.ubc.ca/wp-content/uploads/sites/101/2019/05/Aspire-Final-Report-Aug19-2014.pdf>.

²² https://strategicplan.ubc.ca/wp-content/uploads/2019/09/2018_UBC_Strategic_Plan_Full-20180425.pdf.

Across the breadth of our subject, we have allocated budget so as to revise and enhance existing programs, as detailed in Sections B, C, and D; to support faculty research, as discussed in Section E; and to develop our engagement with communities, as explored in Section F.

To illustrate, we have made major revisions to the delivery of the Bachelor of Management, a general management program that is structured around business functions, so as to enhance the learning experience of students, and simultaneously open routes to developing minors, hence new revenue streams. We did so, aware that all of our resources should not be channeled solely into the Bachelor of Management and its associated activities – the campus has wider aspirations that the management subject should address. There are opportunities to pursue, including if we collaborate with colleagues across the university.

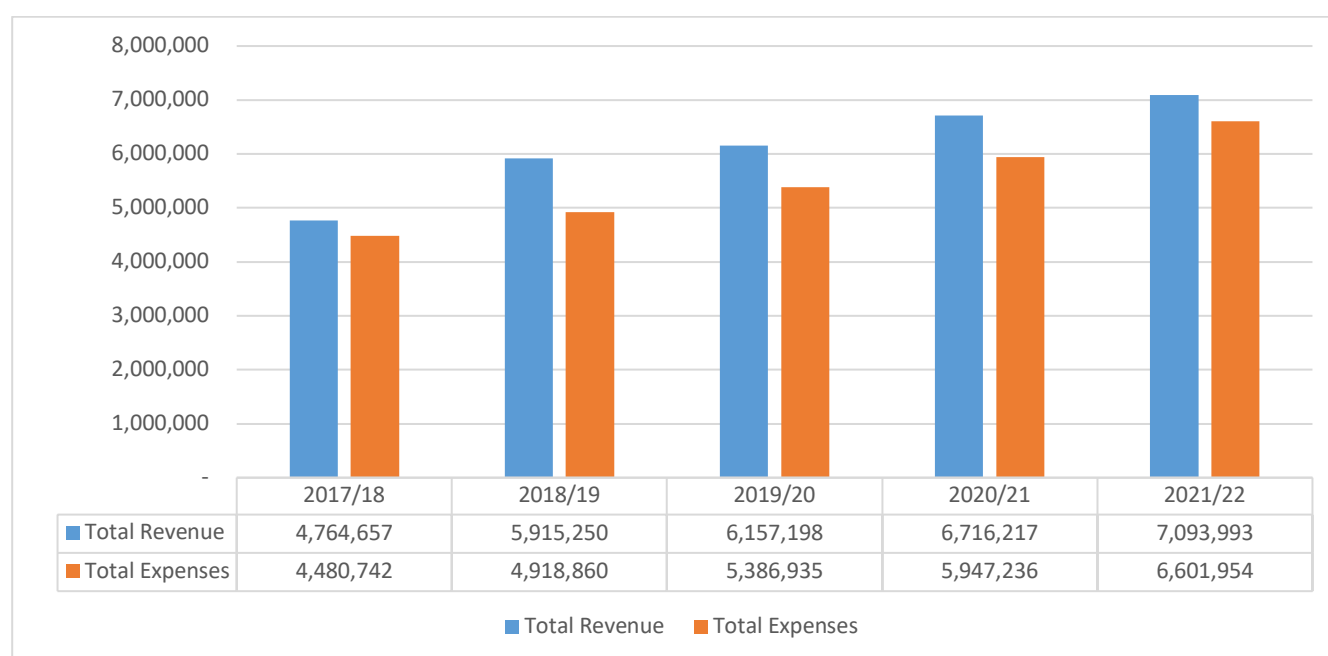
For example, work with a group of colleagues from across the Okanagan campus led to the Dual Degree Master of Management. It is important to all Faculties, because it can be attractive to undergraduates in programs in all Faculties, enhancing learning opportunities and yielding revenue streams. It also has a curriculum that goes to the essence of Okanagan campus aspirations.

We have budgeted our activities with the academic mission paramount, and without budget being the prime driver. For instance, we have remained committed to offering the courses in the Bachelor of Management that are needed to satisfy professional designations, notably for accounting, notwithstanding the strain on our resources. We have also given ourselves time to nurture student recruitment into the post-experience Master of Management, so that we can attain our target cohort size, 25 students.

Budget summary, 2017-2022

Since 2017, Faculty revenue has grown from just under \$5 million to a little over \$7 million. In the corresponding period, our costs grew from about \$4.5 million to more than \$6.5 million (Table G1).

Table G1 Faculty of Management Revenue and Costs, 2017-2022



Changes in the sources of revenue are shown in Tables G2 and G3. The main alteration has been increased international student tuition.

Table G2 Sources of Revenue, Faculty of Management, 2017-2022

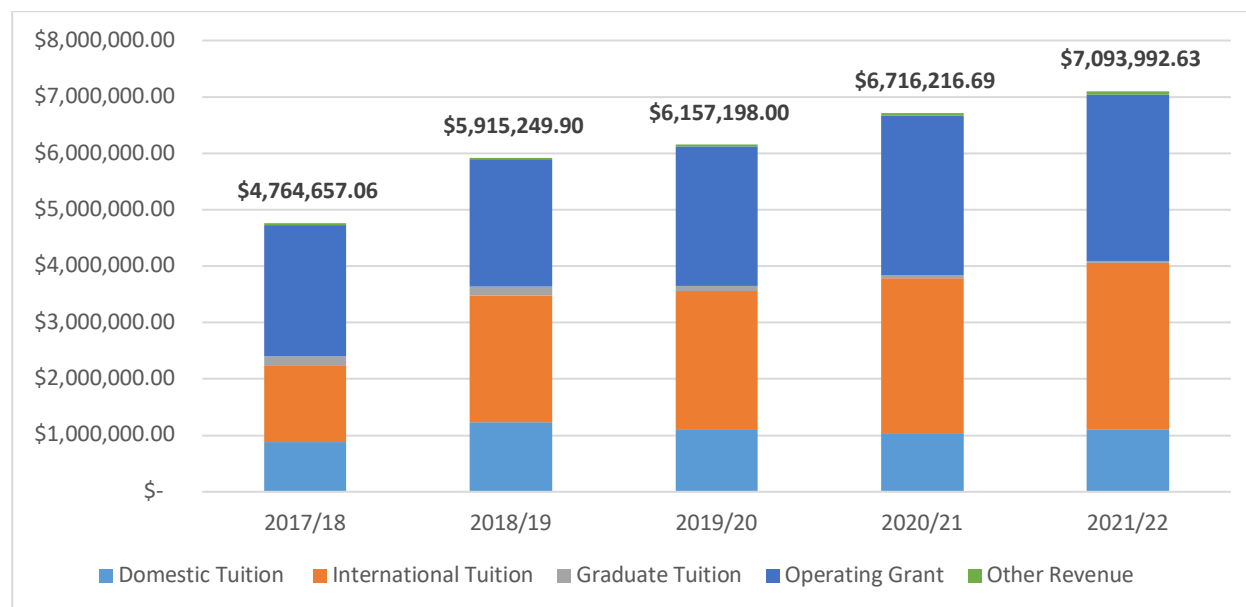
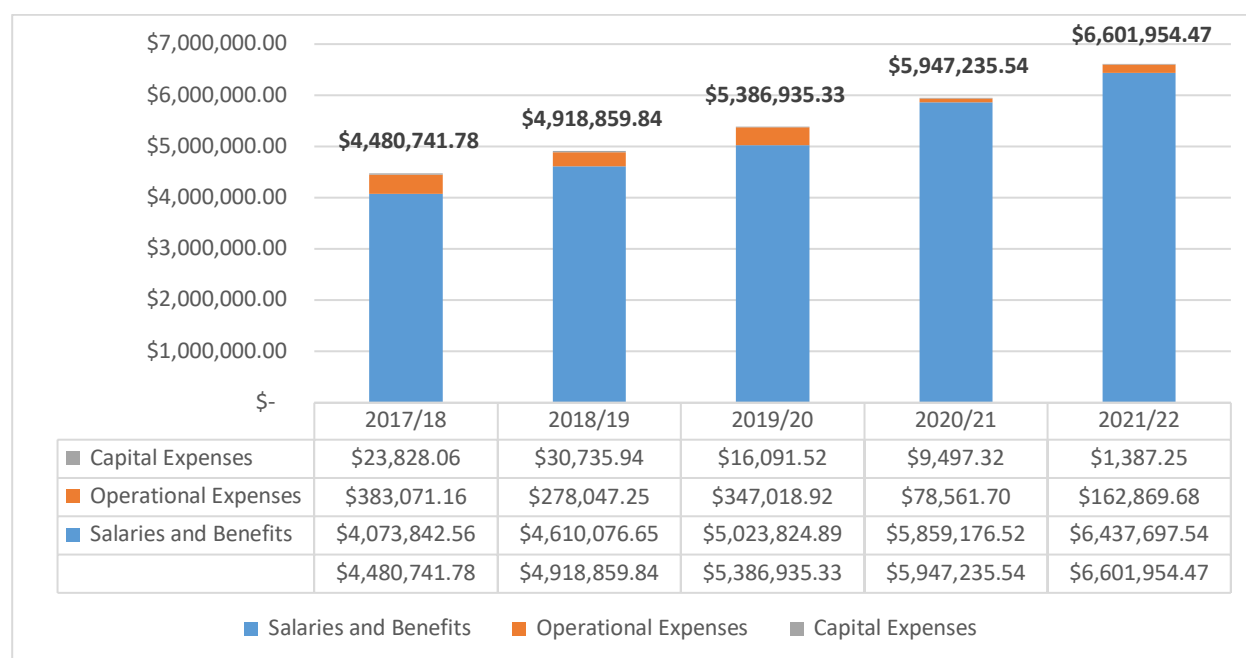


Table G3 Changes in Share of Revenue by Principal Source, Faculty of Management, 2017-2020

% of total revenue	2017/18	2018/19	2019/20
Domestic Tuition %	18%	21%	18%
International Tuition%	28%	38%	40%
Recurring Grant %	49%	41%	41%

Changes in our costs are shown in Table G4. Salaries and benefits are the overwhelming driver – 98% of total costs in 2021-2022.

Table G4 Sources of Costs, Faculty of Management, 2017-2022

The operating report of the Faculty of Management is summarised in Table G5.

Table G5 Summary of Operating Reports, Faculty of Management, 2017-2022

	2017/18	2018/19	2019/20	2020/21	2021/22
	Actual	Actual	Actual	Actual	Actual
Funding Allocation ⁽¹⁾					
Domestic	879,306	1,233,010	1,097,030	1,036,985	1,112,657
International	1,356,772	2,249,567	2,458,011	2,753,773	2,947,119
Graduate	162,733	153,185	96,620	54,629	30,476
Total Tuition	2,398,812	3,635,761	3,651,661	3,845,387	4,090,252
Operating Grant ⁽²⁾					
Recurring	2,348,853	2,422,241	2,536,857	2,935,671	3,031,921
One Time	(23,953)	(167,541)	(65,891)	(107,855)	(84,905)
Operating Grant	2,324,900	2,254,700	2,470,966	2,827,817	2,947,017
Other Revenue	40,945	24,788	34,571	43,013	56,724
Total Revenue	4,764,657	5,915,250	6,157,198	6,716,217	7,093,993
Expenses					
Salaries and Benefits	4,073,843	4,610,077	5,023,825	5,859,177	6,437,698
Operational Expenses	383,071	278,047	347,019	78,562	162,870
Capital Expenses	23,828	30,736	16,092	9,497	1,387
Total Expenses	4,480,742	4,918,860	5,386,935	5,947,236	6,601,954
Interfund Transfers	(192,096)	(162,541)	(156,981)	(208,608)	(92,412)
Net Surplus (Deficit)	91,820	833,849	613,282	560,373	399,626
Beginning Carry-forward	827,543	919,363	1,753,212	2,003,179	2,563,552
Less: Tuition Deferral			(363,315)		
Ending Carry-forward	919,363	1,753,212	2,003,179	2,563,552	2,963,178

Challenges, and opportunities – budget

- Within the Faculty, the allocation of resources between extant activities and new initiatives can be a cause for disagreement amongst colleagues. There are different perspectives on what the Faculty ought to be, how, and for whom.
- The drivers of the Okanagan campus budget, in particular concerns that the budget does not prioritise the campus academic mission, are a challenge shared across Faculties. They are the subject of ongoing discussions amongst campus Deans - the Deans Academic Resourcing Working Group has been convening routinely for nearly a year to explore the implications, and possibilities

for change. How these shared concerns are resolved, amongst the Deans and with university leadership, will influence the future development of each Faculty, including the Faculty of Management.

- The Okanagan Deans have emphasised their collective commitment to a campus vision with shared relational accountability, focused on interdisciplinarity, social justice, global engagement, indigeneity, and sustainability. They have stressed the necessity to work more and better across Faculties, and to create focused, revenue-generating programs that are academically driven and unique to UBC in the Okanagan. If that collective commitment is maintained, it might bode well for opportunities that build on what the Faculty of Management has been doing.

H. RECAP - CHALLENGES, AND OPPORTUNITIES

This “taking stock” document has been prepared by the Deans office. It offers a perspective on the Faculty’s activities and organisation, where they have come from and where they are now. It is written at a time of transition, the last year of office for a Dean who has served two 5-year terms, plus an extra year at the invitation of the Provost and Vice-Principal Academic. Whilst it is not for the Dean’s office at this point in time to offer a vision and plan for the coming years - that is a task for new leadership, faculty, and staff, in due course - each Section of this document has offered comments on challenges and opportunities going forward. These are reproduced here, by way of a summary of some considerations for the future development of the Faculty of Management.

The wellbeing of faculty and staff

- We have concerns for the wellbeing of faculty and staff in the Faculty of Management, primarily at a human level, and also as a matter of organisational sustainability.
- For a number of years, and as before the pandemic, the size of the Faculty has been a major difficulty, in the context of the requirements and expectations of UBC for administering a Faculty, the responsibility to maintain and enhance quality standards in all aspects of our activity, and the thin market for faculty and staff, especially for a non-metropolitan campus. That remains the case.
- A consequence is a lack of capacity to address crucial areas of development, ranging from basic operational matters such as representation on campus-wise committees and working groups, through to capacity to address crucial university initiatives such as EDI and anti-racism. There is also a vicious spiral. The small size places acute pressure on colleagues, who become very stretched, making recruitment efforts even more problematic.
- The pressures on faculty and staff as a consequence of Faculty size have been further exacerbated by experiences throughout the COVID-19 pandemic.

Organising ourselves

- The size of the Faculty is an important challenge when thinking about how we organise, manage and lead ourselves. In the context of the requirements and expectations of UBC for administering a Faculty, the Faculty of Management is a micro-enterprise. That gives us cause for concern about the wellbeing of faculty and staff, first and foremost at a human level, additionally as a matter of organisational sustainability. The required minimum size for a Faculty is unclear, informal discussions amongst colleagues suggesting that it is perhaps 65 active faculty members, with correspondingly proportionate numbers of staff. Whatever the precise number, we are far short.
- The Faculty currently lacks the capacity to address crucial areas of development, including basic operational matters such as representation on campus-wise committees and working groups, through to addressing crucial university initiatives such as EDI (equity, diversity, and inclusion) and anti-racism. We are also in a vicious spiral:
 - The small size places acute pressure on colleagues, who become very stretched, making recruitment efforts even more problematic
 - Experiences throughout the COVID-19 pandemic have seriously exacerbated the pressures on faculty and staff

- Notwithstanding our ideal approach to organising, managing, and leading the Faculty, and as might be expected, in practice there remain disagreements amongst colleagues. There are different perspectives on what the Faculty ought to be, how, and for whom, and the impact on activities, operations, and people is perhaps exacerbated by our being such a small Faculty.
- UBC's grading standards for management and professional (M&P) staff are based on the roles and requirements of UBC's Vancouver campus. This has made it difficult to appropriately classify, or re-classify, staff positions in the Faculty. The grading of positions is crucial to attracting, retaining, and respecting capable and talented staff. While we are a young Faculty with lots of room for change, we are at a pivotal point. We need capable staff, whose responsibilities in complex, change-oriented environments are different from those in an established Faculty with large numbers of staff carrying out specialist roles (the norm on the Vancouver campus). Classification of staff positions on the Okanagan campus seems to be understood primarily as a difference in volume and scale compared to Vancouver, rather than as a substantive difference in complex and changing tasks and responsibilities, with particular roles spanning an unusually wide area of specialisations, without diminishing the depth of expertise and competence expected in each area.
- Our Faculty organisation distinguishes between two sets of activities that are both important to the campus going forward:
 - Activities surrounding the Bachelor of Management and its associated initiatives, as well research by Management faculty not participating in SE-Change
 - The coming together of faculty and staff from across Faculties and campuses through SE-Change

Both include exciting opportunities for future development. How the two areas, and the relationship between them, are managed going forward, will be a major influence on the success of the Faculty, and significant for UBC in the Okanagan.

- Workplace surveys suggest a number of areas warranting future consideration in the Faculty, including: communications, inclusion and respect, and remote working.
- How remote work possibilities are managed, for staff and faculty, will impact the Faculty's requirements for physical space, and bear in mind that we are already facing increasing space challenges.

Bachelor of Management

- Communicating the distinctiveness of the Bachelor of Management, Faculty, and Okanagan campus to prospective students in Canada and abroad can be problematic. The Faculty has a good and close working relationship with the University Recruitment and Student Admissions Office, and together we recognise that this challenge requires long-run commitment, building our reputation over time.
- Growth in student numbers, coupled with budget constraints, challenges the prospects of intimate learning environments, requiring purposive strategies to foster engagement and cohesiveness across students, faculty and staff. Initiatives such as the working group on online delivery (Appendix B6) are critical in this regard. More generally, such initiatives are pertinent to enhancing student learning experiences. That is a matter warranting ongoing attention.
- Enriching the undergraduate program with experiential learning opportunities can require significant energy and commitment. Mobilizing partners in the geographically dispersed Okanagan,

and in the Interior more widely, involves the commitment of sparse Faculty resources. This is mirrored on a global setting, as we explore ways of further mobilising cross-border relationships to develop international opportunities for students. Similar challenges are faced by units across campus. There are opportunities for resources to be used more effectively by enhancing collaboration and coordination across organisational boundaries.

- The introduction of minors in management that are linked to the Bachelor of Management has been strongly welcomed across campus, and the minors are expected to grow significantly.
- The BMgt is structured around business functions, draws upon experiences with such general programs elsewhere in North America, and looks to opportunities from being located in the Okanagan. There is still significant scope to build on this agenda, and such distinctiveness, by complementing the BMgt and its minors with, for example, innovative certificate programs for undergraduates, master programs, and outreach education.
- An in-depth review of the BMgt curriculum, with consideration of how it might simultaneously enhance the quality of student learning, and be delivered more efficiently, could simultaneously improve the quality of the program and its associated minors. It could also release resources for investment in complementary certificate, master, and outreach programs.

Graduate studies

- Given the significance of graduate research programs for a thriving research environment, the absence of programs squarely focused on particular research agendas can be difficult. Interdisciplinarity as such is not the drawback, but the Interdisciplinary Graduate Studies programs can be problematic in terms of their themes leaving some faculty with a sense that they have no opportunities to participate (<https://gradstudies.ok.ubc.ca/igs/>), and the way they are organised leaving some faculty feeling excluded.
- Many UBC internal supports do not apply directly to the Master of Management programs. Because they are at the cutting-edge of UBC experience, they do not follow typical formats on either the Okanagan or the Vancouver campus. This includes tasks such as recruiting students, promoting and marketing to potential applicants, collecting applications, offering admission, collecting tuition deposits, assessing tuition correctly, establishing scholarships, course scheduling, and engaging instructors from across the university, and at partner universities. Additionally, the interwoven nature of MM courses and collaborative style of instructor contributions limits the ability to collect Student Evaluation of Instruction (SEI) data. SE-Change offers new opportunities and solutions in those regards, and, as challenges arise, many people across UBC are eager to find creative solutions
- The ethos of both versions of the Master of Management programs has diversity and collaboration amongst students at its heart. There are corresponding opportunities because they can appeal to non-traditional students, including Indigenous students, and students from diverse locations, as well as those who often have extensive travel commitments as an integral aspect of their work.
- Reaching potential students for the post-experience Master of Management continues to require the hands-on involvement of faculty and staff closely associated with the program, to establish the program's distinctive characteristics from the outset. It also needs specialist expertise, which will need to be hired. Alumni have expressed strong commitment to the program, given their appreciation of their own learning experiences, thus a desire to work with us on student recruitment. Opportunities also exist from the potential to work more closely with international

partners, such as Orkestra, and to learn more about recruitment possibilities in different parts of the world. The introduction of new activities, such as the Dual Degree Master of Management, can give rise to economies of scale and scope. For instance, work with international partners to enable their undergraduate students to access the Dual Degree, might yield opportunities to promote the possibilities of the post-experience program.

Interdisciplinary Co-op Education

- Interdisciplinary Co-op Education has grown rapidly in a relatively short period of time, yet it is largely organised in ways that are similar to those originally introduced for a program that was far smaller, and less complex. We are currently reviewing our organisational roles and responsibilities, structure, and processes, with a view to being more effective at organising, managing and leading co-op education. The aim is to enhance the experience for students and employers, and be able to identify, prioritise and address new opportunities.
- One factor in our early success with co-op education was the development of close relationships with community partners. That enabled us to ensure that students could have the best possible learning experience during a work term, and that employers had reasons to value the program. With rapid growth in recent years, those relationships have become more challenging to maintain and develop. One reason for our review of organisational roles and responsibilities, structure, and processes is to ensure close relationships underpin all that we do.
- As the program continues to grow, the capacity of the Okanagan economy to provide a sufficient number of quality work terms becomes strained. Developing relationships with community partners that are further afield is more resource intensive, but a challenge that we need to meet. Our diverse students would also benefit from our being able to open a wider set of experiences in which they could learn, not only locally but also province-wide, nationally, and internationally. One way that we plan to proceed in this respect, is to work more closely with our partner universities in other jurisdictions.
- We recognise a need to continue the develop access to Interdisciplinary Co-Op Education for international students, and for Indigenous students. The recommendations in the report on *Identifying Challenges, Creating Opportunities - Indigenous Students and Work-Integrated learning at UBC, 2020-2021* offer good building-blocks.
- The development of sector specialisations offers exciting prospects, and our intention is to learn from the opportunities provided by the pilot Wine Sector Co-op Specialisation. Our challenge is to reflect on the role of an introductory course as a way of preparing students for their work terms, and to become more effective at linking explicitly between undergraduate studies and work experiences. Our intention is to learn through, and from, the evaluation of the Wine Sector Co-op Specialisation.

Research

- The size of the Faculty places an in-principle limit on the capacity for growth in research. For example, our research funding cannot reasonably be expected to keep growing. In itself that is not a problem, but in a university that can sometimes value research funding as a Faculty performance metric, it can be challenging.

- Faculty size also weakens our capacity for research mentorship, and impacts our research culture, notably because more experienced faculty are often overburdened with administrative duties, albeit we encourage faculty to develop their own support networks, across the campus and university, and internationally.
- There can be tension between teaching, service, community engagement, and research. The priority areas of *Aspire* around student learning, research excellence, and community engagement can present competing priorities for faculty, especially those who have yet to be tenured. It can be difficult for faculty to balance their efforts and outputs. We organise support staff roles to assist faculty as much as possible, but tensions can remain.
- An additional factor in the development of our research activities is limitations around graduate research programming on the Okanagan campus, bearing in mind that strong graduate programming influences the development and sustainability of a thriving research environment.
- As a subject area, management is critical to the strategic agenda of the campus, as reflected in the ways that our research is positioned with respect to the three main themes that emerged from *Aspire: Envisioning Our Future*.

Community engagement

- Engaged relationship building requires significant investment in both time and resources. As a regionally-based campus, we must also avoid saturation of partners, which could cause fatigue. With both of these factors in mind, 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.
- When people engage with UBC and with the Faculty of Management, sometimes they do not recognize a difference in role between a program lead, faculty member, staff member, or even a student. Sometimes, there can be confusion about roles across members of UBC. The result can be problematic confusion. It suggests a need for greater clarity amongst ourselves and with community partners, and for more, and more careful communication.
- As we plan for the further development of the Faculty, we see community-engaged experiential learning as a focal point. We have been reviewing the opportunities that we provide - that review needs to be completed, and followed through. In doing so, there are opportunities for synthesis, complementarity, and growth across experiential learning activities; for example, evolving a structure that would enable us better to identify where a capstone project leads to a co-op opportunity.
- Developing approaches to engaging with Indigenous communities, and re-thinking how to work with established and emerging Indigenous scholars, and Indigenous knowledge-keepers, are imperatives. In part this might include participation in interdisciplinary, cross-campus initiatives that view Indigenous perspectives on organising, managing and leading social and economic activities as part of a wider set of concerns. Embracing Indigenous perspectives and understanding on the terms of Indigenous peoples is especially problematic in the Bachelor of Management, where much remains to be achieved.
- There are ongoing possibilities to enhance our work with alumni, to open opportunities for students within the organizations where they work. This would allow the organizations to benefit from the inputs of our students, the students to gain valuable work and learning experience, and the UBC-alumni relationship to be deepened.

Budget

- Within the Faculty, the allocation of resources between extant activities and new initiatives can be a cause for disagreement amongst colleagues. There are different perspectives on what the Faculty ought to be, how, and for whom.
- The drivers of the Okanagan campus budget, in particular concerns that the budget does not prioritise the campus academic mission, are a challenge shared across Faculties. They are the subject of ongoing discussions amongst campus Deans - the Deans Academic Resourcing Working Group has been convening routinely for nearly a year to explore the implications, and possibilities for change. How these shared concerns are resolved, amongst the Deans and with university leadership, will influence the future development of each Faculty.
- The Okanagan Deans have emphasised their collective commitment to a campus vision with shared relational accountability, focused on interdisciplinarity, social justice, global engagement, indigeneity, and sustainability. They have stressed the necessity to work more and better across Faculties, and to create focused, revenue-generating programs that are academically driven and unique to UBC in the Okanagan. If that collective commitment is maintained, it might bode well for opportunities that build on what the Faculty of Management has been doing.

External Review of UBC Okanagan Faculty of Management

For the Period 2017/18 - 2021/2022

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February 2023

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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.



THE UNIVERSITY OF BRITISH COLUMBIA

Faculty of Management
Okanagan Campus

FACULTY OF MANAGEMENT RESPONSE TO THE EXTERNAL REVIEW REPORT

Submitted by the Dean's Office
on behalf of the Dean *pro tem*

Prepared March-June, 2023

External reviews are critically important to maintain the academic integrity and quality of a university's programs by providing transparency, accountability, and opportunity for continuous improvement. The Faculty of Management wishes to express its appreciation to the students, alumni, community members, staff, and faculty who have engaged with the External Review and response processes to provide their views and feedback. We also appreciate the evident care and attention devoted by the External Review committee in listening to our community and compiling a comprehensive list of 28 recommendations.

Subsequent to the External Review, a Dean pro tem was appointed to manage and lead the Faculty while we search for a new Dean.

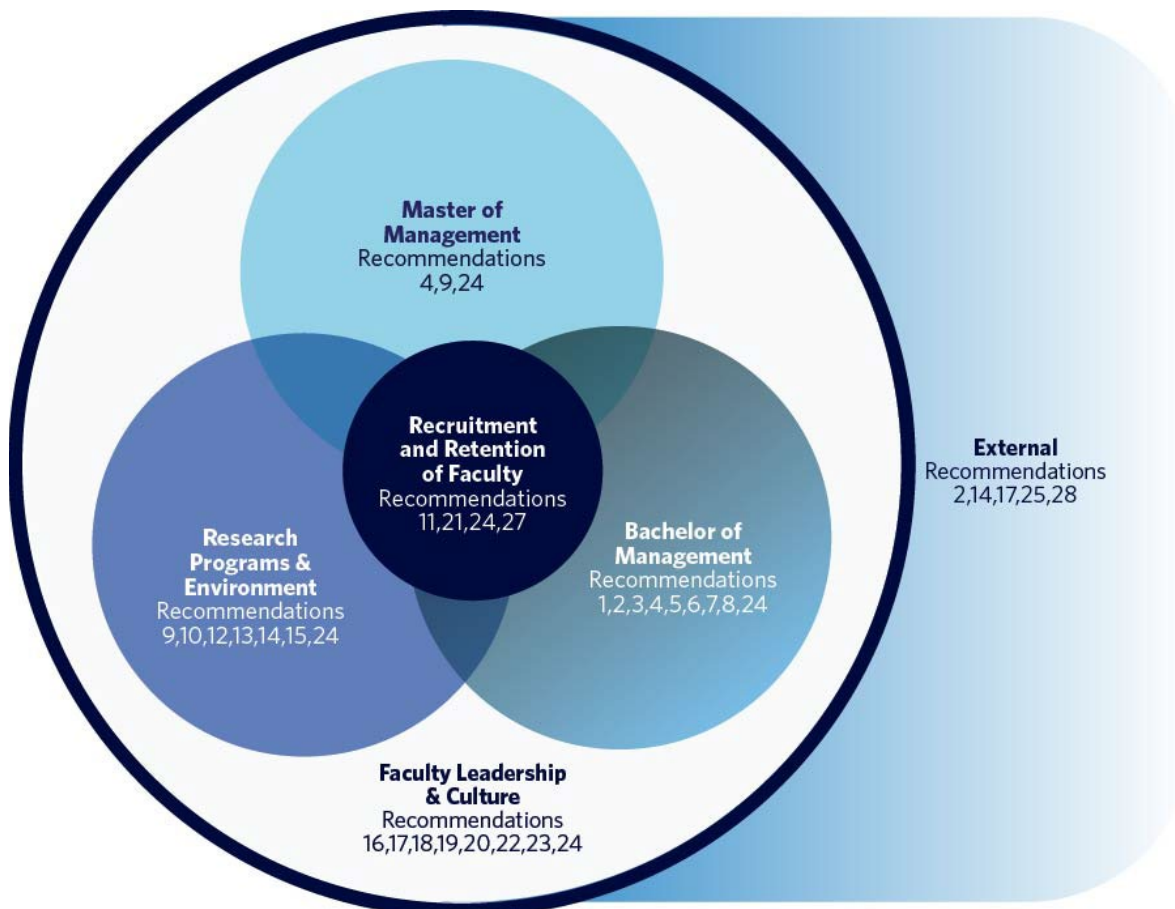
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Introduction

An external review is, by design, a reflection on the past. Conversely, the Faculty's response focuses on the future of the Faculty of Management by providing clear actions that we will take to address the items raised in the External Review. Our Faculty has demonstrated its potential to be a vital contributor to UBC, our region, and global scholarship and management practice. Yet we recognize that we have fallen short of our aspirations so must now do more to plan, implement and measure our efforts. This document articulates our first steps forward, in response to reviewers' recommendations and work to set conditions for a new Dean's strategy-formation initiatives. Delivery of the outcomes we seek will require alignment of vision, energy and action with our community, and commitment by the Faculty to accountability to that community. To help achieve this alignment, in March-June 2023 the Dean's Office engaged in extensive consultation with students, staff, faculty, and external community members. The actions identified in this response reflect the insights gathered from these consultations. The Appendix to this response summarizes the consultation process.

As asserted by the External Review and revealed by consultations with our community, it is clear that the Faculty is facing significant challenges and opportunities. The consultation process emphasized the interdependency of the 28 recommendations and actions we plan as our response. Effective implementation of the actions outlined in this response will require a blend of individuated and closely coordinated actions. Some actions can begin immediately. Others require long-term sequential and synchronized efforts.



With substantial input from our community, we have organized the recommendations from the External Review in a framework highlighting the interconnected nature of planned actions. This framework is intended to encourage an integrated strategy that considers the potential impact, dependencies and synergies amongst the recommendations and related actions. The framework is intended to serve as a map that guides our efforts and allocation of our resources.

Current and future students are at the heart of all we do as a learning community and institution. We are focused on our Bachelor of Management students, our Master of Management students, and research programs constituting the environment in which students and faculty are joined together as a learning community. Our ability to support our learning environments depends on recruiting and retaining faculty, whose excellence in research and scholarship of teaching sustains student learning at the leading edge of management knowledge. Effective and transparent Faculty leadership is needed to create and guide implementation of a Faculty strategy in concert with campus and system plans, and to sustain an academic culture supporting our students, our staff, and our faculty. Finally, the framework recognizes the importance of connecting and engaging effectively with the many members of our external community, whose support is essential to our success, from alumni to organizations committing time and resources to experiential learning opportunities for our students.

We understand and underscore in our specific responses to the recommendations the importance of sustained and coordinated improvement beginning now and extending into the next Dean's mandate. Our response to the recommendations is intended to begin necessary improvement immediately while creating the conditions for the incoming Dean to guide the Faculty's longer-term development through a strategic planning process. The actions described in this response are accordingly balanced between near-term and longer-term initiatives implementing External Review recommendations and community members' recommendations, readying the Faculty for further change.

Undergraduate Education and Student Learning (Recommendations 1-4)

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 creating of majors, and interdisciplinary themes aligned with the strategic direction of the school.*

The Faculty welcomes reviewers' support for curriculum review in progress at the time of the review, now further supported and intensified in light of reviewers' remarks.

We plan to implement immediate response to student interest in easily understood and easily accessed Bachelor of Management program pathways. Articulation of program pathways will enable students to better plan their journey through the Bachelor of Management, and to communicate to future employers, graduate schools, and others the "specialization" or "concentration" areas in which students have developed deepest knowledge. The Faculty is working to identify sets of courses analogous to 15-credit "specializations" offered by UBC's Sauder School of Business. Identification of pathways to achievement of specializations will provide students with earliest possible guidance in selection of complementary and mutually reinforcing courses creating a distinctive subject matter focus, beginning from but not limited to specializations reflecting majors and similar concentrations offered by peer faculties in peer institutions.

To respond to student interest in formal recognition of program pathways, we will work within BC Ministry of Post-Secondary Education and Future Skills policies and UBC academic policies to identify options for institutional recognition of specializations on transcripts, degree certificates, and other UBC documents that confirm student achievement.

We acknowledge the importance of creation of distinctive specializations or concentrations differentiating our Bachelor of Management program from comparable programs, while providing students with study options enabling exploration of individual interests. Since effective delivery of distinctive specializations or concentrations benefits from availability of research-led teaching, we acknowledge that our renewed strategic planning process (Recommendation 17) must be implemented in tandem with hiring of additional tenure-stream teaching- and research-track faculty members (Recommendations 11 and 21). Our current faculty complement is diverse in its areas of expertise, but is nonetheless too small to sustain offerings of an appropriately wide range of specializations without interruption to offering by predictable factors such as leaves and retirements. Institutional support for additional tenure-stream hires is accordingly crucial to delivery of renewed Bachelor of Management curriculum satisfying expectations of student, employer, graduate schools, and additional external stakeholders (Recommendations 11, 21, and 27).

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

We welcome the recommendation to develop and define experiential learning activities. Efforts in this regard were underway at the time of external review, and are now increased in response to the review's recommendation. In October 2022, the Faculty received an internal report evaluating experiential education opportunities in the Bachelor of Management program. In April 2023, faculty met to discuss the report and determine next steps. As we develop these activities, the Faculty will resume the Live Case Challenge in 2023/2024, offering current students the benefits of an experiential learning opportunity long promoted and regarded as a distinctive feature of the undergraduate program.

Our review of experiential learning requires extensive, time-consuming engagement with a wide range of stakeholders – prospective and current students, alumni and community partners – to best understand the value of experiential learning and how to make it accessible and meaningful to students and community partners. To that end, and with recognition that campus-wide experiential learning opportunities are evolving rapidly, we are working with the Office of the Provost, and Student Services, to better align campus-wide activities with Faculty of Management activities.

The Faculty plans to continue work underway to enhance experiential learning, and to incorporate into strategic planning a wider evaluation of particular experiences serving to differentiate our programs from those of peer institutions (Recommendations 1 and 17).

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 Faculty shares reviewers' concern that the Bachelor of Management program's brand and position do not reflect our aspirations. Current stakeholder perception of the program demonstrates that prior efforts to distinguish the program from traditional business programs have not been effective. Our program requirements, in particular, have not been perceived as differing significantly from national and international peer programs. We are reviewing our current framing of the core elements of the Bachelor of Management curriculum. At present the degree's compulsory courses are organized around traditional business/management foci, as stated in the UBC Okanagan Academic Calendar, "The Bachelor of Management areas of focus are general management, accounting, entrepreneurial technology, finance, human resources/organizational behaviour, marketing and operations/supply chain." Alignment between the undergraduate program renewal activities and the program marketing and recruitment is an opportunity to improve communication of program features with stakeholders who are keen to build enduring relationships with the Faculty.

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.*

The Faculty is planning and implementing its part in realization of UBC Okanagan's 2019 Declaration of Truth and Reconciliation Commitments, supporting indigenization, decolonization and reconciliation.

The Faculty has recruited an Indigenous instructional position to inform a Faculty indigenization initiative, and we have initiated discussions with Indigenous subject-matter experts to inform

curriculum indigenization. Working with the new position, we will develop training materials and curriculum resources to integrate Indigenous perspectives, knowledge, and competencies into Bachelor of Management and Dual-degree Master of Management curriculum.

The initiative will additionally foster a community of practice to enhance intercultural understanding, empathy and mutual respect. The Faculty recognizes the need to develop relationships and collaborations with Indigenous communities as part of this process. Working with community partners, we will co-develop a series of workshops for faculty. Part of this initiative is driven by the Faculty's commitment to be better prepared to meet the needs of Indigenous students and communities, including development of culturally appropriate recruitment strategies to welcome Indigenous students into the Faculty (Recommendation 24).

Academic Experience and Support (Recommendations 5-8)

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

We acknowledge the importance of regular meetings between the Dean and the Dean's Office with the Management Student Association (MSA), recognizing the MSA as an important connection to the body of students enrolled in Management courses and programs. Since February 2023, the Dean *pro tem* has engaged regularly with the MSA, and has committed to enhancing faculty, student and staff mutual understanding and trust via resumption of activities paused during the pandemic. We plan to hold an annual orientation meeting for MSA and Faculty of Management leadership; continue partnership in delivery of annual events; and engage in regular consultation to inform Faculty governance.

The Faculty also recognizes that not all Management students are active in the MSA. The Faculty is committed to continuous engagement with the entire body of undergraduate and graduate Management students, and students from other faculties who enrol in Management courses. This is an important adjustment as our launch of the new Dual-degree Master of Management program will be a future home of undergraduate students enrolled in undergraduate programs across several faculties, some enrolling in just a few Management courses prior to transition to graduate study in Management. Our aim is to ensure that all students – and especially Bachelor of Management, future Dual-degree Master of Management students, and other students interested in management topics – have the opportunity to be aware of and informed of Faculty functions.

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

The Faculty welcomes input of students and our alumni as we continually evolve our programs with the oversight of the UBC Okanagan Senate consistently with broader UBC system strategies and requirements established by the Ministry of Post-Secondary Education and Future Skills. We commit to continued student representation at Faculty Council, and in key working groups developing and revising our mission, vision and strategy.

We believe that students and alumni should be important contributors in development of the Faculty's future strategic plan (Recommendation 17).

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

Following receipt of external reviewers' remarks, in April 2023 the Faculty reviewed student supports provided by Advising and by our own Academic Programs Office and identified opportunities for improvement. The Faculty has since reorganized non-academic staff within the Academic Programs office while simultaneously revising processes to increase the speed of response to student queries.

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

The Faculty acknowledges its role as a partner to co-curricular activities beyond the Faculty's core function as an academic program provider. We will work with campus and community resources to offer students varied co-curricular experiences supporting personal growth, whether in volunteer, leadership, recreational or other activities. Faculty members are enthusiastic supporters of co-curricular activities as vital contributors to student experience of UBC, and to student feelings of belonging and to a balanced student life supporting academic success. The Faculty is committed to contributing to co-curricular activities as its small body of faculty members and limited time and resource permit. At present, we are working closely with campus partners and the MSA to develop a new set of co-curricular activities appropriate for students of Management and others across campus. In parallel, we are developing a range of Faculty-based events. For example, in 2023/2024, the Faculty will work closely with community partners to host workshops acquainting students with specific management career options. Throughout our support of co-curricular activities, we will improve the clarity and comprehensiveness of our communications to students, to enable student planning to make the most of all co-curricular opportunities.

Graduate Education (Recommendations 9-10)

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 students.*

The Faculty endorses creation of a research-based graduate program as an important longer-term goal, benefiting from and sustaining a strong research culture. In the near term, pursuit of this recommendation requires prior completion of response to Recommendation 21, addressing faculty shortage at all ranks. Faculty recruitment will serve as a key enabler to the Faculty's ability to deliver existing and planned programs while planning for growth. We continue to support graduate education pathways for a small number of research-oriented students in the Interdisciplinary Graduate Studies program, while delivering the existing Master of Management program and preparing for delivery of the Dual-degree Master of Management in partnership with Faculties across campus. Delivery of these activities during redevelopment of the Bachelor of Management program (see Recommendation 1) consumes the greater part of available Faculty resources, and in particular, faculty time. We are nonetheless actively engaged in identifying longer-term program options in preparation for the arrival of a new Dean. Among our activities we note discussion with the College of Graduate Studies regarding opportunities for creation of new interdisciplinary graduate study themes, and we are working to identify ways for faculty (especially pre-tenure) to recruit and supervise graduate students

where creation of highly qualified professionals is a condition of research funding. This action is consistent with, and related to, the action we supply in response to Recommendation 10.

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

The Faculty welcomes the opportunity to contribute to processes established by the College of Graduate Studies with respect to revision of the Interdisciplinary Graduate Studies themes. The Faculty is supporting discussion with the College of Graduate Studies with respect to introduction of new themes, and we are working with other Faculties to identify opportunities for graduate students across campus to participate in research overseen by Management faculty members. We recognize in this context that delivery of responses to Recommendations 11-15 is important to creation of a robust research culture within the Faculty, supportive of graduate education both within the Faculty and connecting faculty members' expertise to students and programs across campus.

Research, Scholarly and Professional Activity (Recommendations 11-15)

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.*

Growth of the tenure-stream faculty complement is a key priority for the Faculty. We are currently engaged in development of a recruitment strategy (aligned with Recommendations 21 and 27) addressing immediate needs while respecting the importance of creating space for a new Dean's strategy-building process and its results. The Office of the Provost has authorized the Faculty to recruit two tenure-stream Assistant Professors together with a senior appointment to be held by the new Dean. We intend to make the most of lessons learned in recent recruitment cycles, enabling us to create a Faculty balanced across junior and senior colleagues who together are committed to creating a vibrant and supportive academic culture.

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

The Faculty has committed resources and administrative support to resumption of a seminar series in 2023/24, responsive to faculty interests while welcoming attendance by students and faculty colleagues from across campus. We recognize and embrace the importance of regular scholarly exchange as an activity at the heart of a research-intensive university's reason for being.

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.*

The Faculty commits to incorporating into our strategic planning process a range of options for visiting scholars (see Recommendation 17). We are especially aware of the potential value of visiting scholars to the development of pre-tenure faculty members' research agendas, and to graduate students'

scholarly development. While we prepare for the new Dean's strategic planning process, we continue to support faculty members seeking to host academic visitors, whether visiting graduate students or faculty. This summer, for example, the Faculty will welcome and support two visiting scholars hosted by our faculty members.

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

We commit to continuation and enhancement of efforts to benefit from special internal opportunities to acknowledge our members and grow our faculty complement, while seeking external funding consistent with the Faculty mission to be revisited in our strategic planning process (see Recommendation 17). We anticipate fulsome engagement with the University's Development and Alumni Engagement Office as a means to securing external support for faculty growth (see Recommendation 28).

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.*

We commit to working with the Development and Alumni Engagement Office (Recommendation 28) to create funds to support allocation of post-doctoral fellowships to new and existing faculty.

Leadership and Administration (Recommendations 16-17)

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 Dean *pro tem* and Senior Associate Dean are fully committed to the Faculty of Management. We are implementing immediate actions to align faculty, staff and student understanding of goals and actions in the context of Faculty membership in a larger campus and University context. Those actions include increased tempo of communications regarding Faculty processes and events, increased in-person contact in social and academic events, and increased accessibility in a post-pandemic climate of in-person and hybrid work and study environments.

We are conscious of the importance of physical space and symbolism to the social function of the Faculty. We are developing a revised plan for the Faculty's administrative office, to increase visibility and accessibility of student-facing functions. The Dean's office, in particular, will be placed in a highly visible central location with adequate space for student reception and connection to the Academic Programs Office and support staff. Recognizing that physical presence is only one part of repairing and rebuilding the management programs, the Dean *pro tem* and Senior Associate Dean are committed to renewing community, communications, transparency and trust.

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 University's search for a new Dean of Management is underway. In the interim, the Dean *pro tem* and the Senior Associate Dean are working with faculty, students and staff to implement immediate improvements as recommended by the external review, and to create relationships, organizational structures, reports, and action options to support the new Dean once they are hired. We anticipate that the new Dean will articulate a vision within the context of our relation to campus and University strategic plans, and that the new Dean will develop a strategic plan responsive to external review recommendations and significant and meaningful consultation with stakeholders beyond the Faculty.

People, Environment and Culture (Recommendations 18-24)

Recommendation 18: *Requirements for tenure and promotion for tenure-track faculty should 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.*

The Faculty engages continuously with UBC Human Resources and Faculty Association representation to maintain and improve communication regarding expectations of faculty. We recognize collectively that Appointment, Re-Appointment, Promotion and Tenure (ARPT) processes have profound implications for individual faculty member career paths, and for our identity and function as a Faculty capable of recruiting and retaining new colleagues. We commit to addressing concerns raised regarding ARPT expectations by engaging the Dean *pro tem*, the Senior Associate Dean and senior faculty in providing informal mentorship to pre-tenure colleagues and to post-tenure colleagues working toward promotion. We commit additionally to providing procedural clarity by locating formal ARPT procedures within the responsibility of the Senior Associate Dean. We look forward to growing the Faculty to a size where larger resources will permit introduction of a formal mentoring program.

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.*

Re-engagement of faculty and staff has been an immediate focus of the Dean *pro tem*. We have resumed or initiated social events during the work day, and we have enhanced communications using a bi-weekly Dean's Office update providing Faculty operations information and celebrating the small successes that build gradually toward a shared sense of mission and identity. Additional activity planning is underway, striving to ensure respect for colleagues' commitments beyond the workplace.

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

The Faculty has begun to offer multi-year contracts to limited-term instructors with extensive teaching history with the Faculty. Moving forward, the Faculty will periodically review limited-term instructor contracts for longstanding instructional members, informed by the changes to the recently ratified Collective Agreement with the Faculty Association.

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

In our response to Recommendation 11 we explained our authorization to hire two new tenure-stream appointments together with a senior appointment as Dean. We are preparing a recruiting strategy to address immediate needs with initial hires, while preserving strategic space for identification of additional hiring needs through a new Dean's strategic planning process.

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

The Dean *pro tem* has resumed regular contact with the UBC's Sauder School of Business. We have jointly identified opportunities to enhance the connection between the two Faculties for teaching, learning and research. For example, project leads for the Sauder School of Business project to enhance business education with Indigenous Knowledge are collaborating with the Dean's Office to inform our Faculty's initiative to Indigenize our curriculum noted (see Recommendation 4). We have also engaged with our Sauder peers to help inform the launch of the forthcoming Dual-degree Master of Management (see Recommendation 9). We recognize that strengthening our relationship with Sauder colleagues can enhance our capacity as a Faculty. The Faculty is committed to ongoing discussions to identify collaborative opportunities.

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

The rapid evolution of the Okanagan campus has considerably changed academic support staff requirements and affordability. We also recognize that some functions previously supplied by the Faculty may now be provided by campus-wide services, offering us opportunities to reconsider our support staff budget in the context of a fiscal 2023 deficit. The Faculty has reviewed staff requirements to identify cost reduction and efficiency opportunities. As a consequence of staff departures, three staff positions are currently unfilled, and they will remain unfilled until operationally required. Simultaneously, we recognize that delivering our action commitments will require additional capacity, and as a result have moved to reassign staff to facilitate this work.

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

UBC Okanagan's 2019 Declaration of Truth and Reconciliation Commitments is a five-commitment response to the recommendations of the Truth and Reconciliation Commission. The Faculty has begun to implement its contribution to the total campus effort to support indigenization, decolonization, and reconciliation, as explained in our response to Recommendation 4. We are additionally committed to improving recruitment of Indigenous students: the Dean *pro tem* is working closely with the Indigenous Programs and Services Office to identify opportunities to engage more effectively with Indigenous communities and students, including integration of management content into existing programming for Indigenous youth. These in-progress actions lay a foundation for further development of our approach in our strategic planning process (Recommendation 17) to be led by a new Dean.

Community Engagement (Recommendation 25)

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.*

In advance of the new Dean's arrival, we plan to undertake preparatory activities including identification of core areas of opportunity for growth and achievement of excellence creating a direction for the Faculty (in relation to Recommendation 17). We plan additionally to engage with stakeholders on-campus and in the wider community, communicating our commitment to program evolution and Faculty development in close collaboration with stakeholders, whose connection to the Faculty we recognize as strained and in need of renewal.

Support for the University's and Campus Strategic Plans (Recommendation 26)

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

The Faculty supports program and institutional innovation in the many forms advanced by faculty, students and staff, within Faculty, campus, institution, and wider governance structures creating the permissions and obligations of university life. Initial and periodic review of new initiatives is a normal feature of institutional innovation. The Faculty is committed to participation in review of the Social and Economic Change Laboratory (SE-Change) to ensure its compliance with applicable norms, and to review its priority in our allocation of efforts in the context of a currently small and resource-constrained Faculty.

Physical and Other Infrastructure and Resources (Recommendations 27-28)

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

The Faculty is committed to seeking growth of its faculty complement. We will seek that growth in specific areas we identify collegially as core to our current and future identity (as observed in response to Recommendation 11), and in expansion beyond our core to establish scholarship of teaching, research, and teaching articulating a distinctive Faculty identity differentiating us from peer Faculties and programs (as observed in response to Recommendation 21). The Office of the Provost is supportive of our near-term plan to augment the tenure-stream faculty complement with two new hires in addition to appointment of the new Dean, creating a base from which a new Dean's strategic planning process can launch. Our planning for Faculty growth with the support of the Provost for that growth is, however, subject to structural budget constraints created by the current tuition allocation model. The Faculty is committed to collaborative engagement with other campus Faculties to identify a durable financial model for delivery of the Dual-degree Master of Management, and to increase financial support for campus-wide opportunities to conduct strategic hiring in ways allowing us to compete globally for talented faculty members at all ranks.

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.*

The Faculty recognizes the importance of the Development and Alumni Engagement Office to identification of directed and undirected donations to the Faculty. The Dean *pro tem* has resumed regular discussions with the Executive Director, Development and Alumni Engagement, and plans to present Faculty priorities to that office in July 2023 with a view to establishing the bases of a longer-term action plan to be augmented by the results of the new Dean's strategic planning process.

Appendix: Consultation Process

From receipt of the External Review (March 2023) to submission of this response to the Provost (June 2023), the Faculty has actively engaged and consulted with our community. We received input and feedback on our response from current students, external community members, staff and faculty.

End of March 2023	<ul style="list-style-type: none">• Received the final version of the External Review.• Circulated the full external review report internally to staff and faculty.• Published a summary of the recommendations for students and external community members.
April 2023	<ul style="list-style-type: none">• Hosted consultation sessions with current students, staff and faculty.• Received survey feedback from current students, staff and faculty.
May 2023	<ul style="list-style-type: none">• Drafted our response incorporating feedback received.
End of May 2023	<ul style="list-style-type: none">• Circulated the full response to all external community members who had engaged with the External Review process, staff and faculty.• Circulated an abbreviated response that was limited to the portion of the response related to undergraduate education and student experience (Recommendations 1, 2, 4, 5, 6, 7, 8) to all current BMGT and MM students.
June 2023	<ul style="list-style-type: none">• Hosted consultation and feedback sessions with external community members, staff and faculty.• Received survey feedback from current students, staff and faculty.• Revised our response to incorporate feedback.
End of June 2023	<ul style="list-style-type: none">• Submitted final response to the Provost's Office.

Faculty of Management External Review Action Timeline						
Rec #	Recommendation Short Text	Complete or in-process by June 30, 2023 (date response was submitted)	Planned for June 30, 2024 (target date for the next Dean to start)	Planned for June 30, 2025 (two-year follow-up report)	Target date (if beyond June 30, 2025)	Who is responsible?
UNDERGRADUATE EDUCATION AND STUDENT LEARNING						
1a	BMGT program pathway communication	Aligned BMGT webpage with UBC calendar description of program focus areas. Course Planning for the Bachelor of Management (ubc.ca) Introduction UBC Academic Calendar	Identify potential elective courses to fill gaps in current offerings. (1c)			Undergraduate Curriculum Working Group
1b	BMGT program pathway formal recognition		Begin work with Senate and Ministry to obtain approval to add "Specializations" (wording TBD) to transcripts and/or parchments	Complete work with Senate and Ministry to obtain approval to add "Specializations" to transcripts and/or parchments		Undergraduate Curriculum Working Group
1c	Curriculum renewal for the BMGT	Completed peer school analysis to identify focus areas.	Complete peer school analysis for required courses and elective courses. Identify potential elective courses to fill gaps in current offerings. (1a)			Undergraduate Curriculum Working Group
2a	Develop and define experiential learning opportunities within the Faculty	Faculty meetings to discuss relaunching Live Case Challenge ("LCC 2.0") for W23 Term 2 (Jan-April 2024)	Run "LCC 2.0" for all students registered in MGMT 360. Identify appropriate format and partners for 2025 and 2026 offerings.			Dean's office with assistance from task force
2b	Contribute to cross-campus initiatives to develop and define experiential learning opportunities	Contributing resources to launch a cross-campus "Experiential Education Hub" (joint with Provost's office and AVPS)	Participate actively in the "Experiential Education Hub"			Dean's office
3	Redevelop student recruiting materials	Work started with both the domestic and ISI recruiting teams	Develop appropriate materials and strategies to achieve recruiting targets			Dean's office
4a	Develop and implement Indigenous content within the management curriculum	Submitted an ALT2040 grant proposal to develop and deliver a series of workshops for faculty to identify opportunities for Indigenization and decolonization of existing curriculum and pedagogy. Hired a part-time Indigenous adjunct professor	Offer speaker series and Community of Practice for faculty. Begin to Indigenize core MGMT courses.			Dean's office
4b	Develop strategy for recruiting Indigenous students	Actively participating in three summer camps for high school Indigenous students	Incorporate feedback from summer 2023 recruiting and revise as needed for summer 2024			Dean's office
ACADEMIC EXPERIENCE AND SUPPORT						
5	Actively engage with MSA and management students	Coordinating with MSA on specific events throughout 2023-24. Developing events and co-curricular programming appropriate for all students across campus who are interested in business and management.	"Partner" with MSA on key academic (case competition) or community oriented (Gala) events. Continue development of programming that is relevant to all students interested in business and management.			Dean's office
6	Students have input into mission, vision, strategic initiatives.		We will continue to rebuild relationships and connections with students to facilitate the launch of a inclusive strategic planning process once the new Dean is ready (17).			Dean's office
7	Improve student support and response times	Reorganized staff within the Academic Programs Office with the goal of decreasing response times and improving support Reorganized physical space for the Academic Programs Office to ensure they are easily accessible for students during operating hours	Assess effectiveness of new staffing arrangement.			Dean's office
8	Resume co-curricular activities	Identify relevant offerings from units across campus (E@UBCO, careers and advising, Indigenous Program Services, etc.) and provide a consolidated communication to management students on relevant co-curricular offerings. Develop key speaker series ("Future of Work") to engage students on particular industries and job functions and help students identify critical employability knowledge and skills	Deliver Future of Work series. Assess effectiveness and plan for next academic year.			Dean's office
GRADUATE EDUCATION						
9a	Develop a research-focused graduate program	We continue to support our faculty participating in IGS and other research-based programs across UBC.			The creation of a research-based graduate program in FOM is a long-term project with no specific start date at this time.	Dean's office
9b	MM curriculum review	Begin curriculum development for the new dual-degree MM program. Gather data from existing post-experience MM curriculum and alumni. Gather data directly from potential employers, peer-schools with similar programs, and national/international studies of employability skills. We have deferred the next entry for the post-experience MM from 2024 to 2025. That deferral provides capacity for the dual-degree curriculum development work.	Continue curriculum development for the new dual-degree MM program (launch May 2025). Re-form a working group of faculty from across campus to help guide development work. Formalize agreements with Deans on how faculty from other units will contribute teaching and how that will be compensated.	Continue curriculum development for the new dual-degree MM program (launch May 2025)		Dean's office Faculty Council
10	Revisit IGS themes	Engaged in discussions with COGS regarding potential new themes.	COGS will be completing an external review in 23/24. We will continue to engage with COGS, the external reviewers, and the broader community regarding themes.			Dean's office
RESEARCH, SCHOLARLY AND PROFESSIONAL ACTIVITY						
11	Hire additional faculty	Received budget approval for two new faculty member hires	Hire at least two new faculty members (target start date July 1, 2024)			Dean's office

12	Develop research seminar series	We have six external research speakers planned for the next academic year	Deliver the research seminar series as planned. Plan the series for the subsequent year.	Dean's office
13	Visiting scholar program	We are supporting two visiting scholars this summer.		Dean's office
14	Attract funding for professorships/chairs	Work has begun with the DAE team		Dean's office
15	Increase funding for post-doctoral positions	Work has begun with the DAE team		Dean's office
LEADERSHIP AND ADMINISTRATION				
16a	Dean and Associate Dean committed to internal needs	We are committed to our internal needs and have launched many new initiatives to support our internal needs.		Dean's office
16b	Dean's office highly visible and accessible	We have started a small renovation project on the 4th floor to provide suitable space for the next Dean. In the meantime, the Dean pro tem and Senior Associate Dean work primarily on campus and have an open-door policy.		Dean's office
17	Develop a five-year strategic plan	We expect the next full-time Dean to start July 1, 2024. In preparation for that, we will continue to rebuild relationships and connections with students and internal and external stakeholders to facilitate the launch of a inclusive strategic planning process once the new Dean is ready.	Complete five-year strategic plan	Dean's office
PEOPLE, ENVIRONMENT AND CULTURE				
18a	Clarify tenure standards and process	We have connected with all pre-tenure faculty to provide advice regarding UBC tenure standards and will continue to provide clarity as we can.		
18b	Develop mentoring program for junior faculty		Develop mentoring plan once we have sufficient tenured faculty	
19	Re-engage faculty and staff to improve camaraderie	A number of social events have already been offered and we will continue to support similar initiatives. Launch a bi-weekly Dean's office communication that increases transparency and shares important events and information.		Dean's office
20	Provide multi-year contracts to lecturers	We offered multi-year contracts to lecturers with extensive teaching histories and will continue to operate in accordance with the new Collective Agreement.		Dean's office
21	Strategic hiring campaign to address faculty shortage	Received budget approval for two new faculty member hires	Hire at least two new faculty members (target start date July 1, 2024)	Dean's office
22	Re-connect with Sauder faculty and staff	The Dean's office has resumed discussions with Sauder (and other Vancouver based professional Faculties) leadership, faculty and staff with the intention to collaborate where possible. In particular, we will continue to connect with Sauder regarding our Indigenization of curriculum (Recommendation 4) and design and delivery of the new dual-degree MM (Recommendation 9).		Dean's office
23	Review non-academic staff levels and roles	Limited hiring into existing or new vacancies.	Work with human resources to ensure our staff complement is organized effectively and efficiently.	Dean's office
24	Intentionally respond to the TRC calls	We have begun specific activity to engage with potential BMGT students (4b), have hired an Indigenous adjunct professor (4a), and are building resources to help faculty consider how to decolonize and Indigenize BMGT and MM curriculum (4a).		Dean's office
COMMUNITY ENGAGEMENT				
25	Create an external advisory council	We expect the next full-time Dean to start July 1, 2024. In preparation for that, we will continue to rebuild relationships and connections with students and internal and external stakeholders to facilitate the potential launch of an external advisory council once the new Dean is ready.		Dean's office
SUPPORT FOR THE UNIVERSITY'S AND CAMPUS STRATEGIC PLANS				
26	SE-Change requires a full governance review	SE-Change remains as a faculty organized laboratory. Initiatives and programs that had previously been communicated as being part of SE-Change have been correctly attributed to the Faculty of Management. This includes: the Wine Research Center, the Interdisciplinary Co-op Program, the post-experience Master of Management, and the dual-degree Master of Management. The Faculty provides no direct financial support for SE-Change. Given the actions we have taken, we do not believe a governance review serves any value at this point.		
PHYSICAL AND OTHER INFRASTRUCTURE AND RESOURCES				
27	Senior administration provide budget support for strategic faculty hiring	Work has begun to identify an alternative tuition allocation model (TAM) to support the Faculty's budget		Dean's office
28	Work with the Development and Alumni Engagement office to raise additional funds for students and research	Work has begun with the DAE team		Dean's office