UBC Okanagan Guidelines for External Academic Reviews

Appendix to Senate policy J-305 on External Reviews of Academic Units
Applicable to:

- Academic Units (Departments, Schools)
- Faculties
- The College of Graduate Studies

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Introduction

An external review of an academic unit (ex., School, Department) or Faculty is a mechanism for quality assurance and enhancement as well as an opportunity for learning, sharing, and creating a collective vision for the unit and the communities it serves. This process encourages a forward-looking evaluation, planning, and prioritization of short and long-term goals for the unit and its programs. External reviews should be designed to evaluate the intrinsic quality and operations of programs and academic units at UBC, highlighting the strengths, challenges, educational and research programs, and adequacy of resources, and to advance the mission of the University. The external review may also be an important and useful way of informing an Advisory Committee in its task to advise on the selection of a new Dean or Head/Director or on the reappointment of a Dean or Head/Director for a second and final term.

The Office of the Provost and VP Academic offers wraparound supports to Faculties/Academic Units as they complete their external reviews; please reach out to the Senior Manager, Academic Programs and Quality Assurance for more information.

Guiding policies and procedures

External reviews are governed by Senate Policy on External Reviews of Academic Units (J-305) and aligned with Board of Governors AP9 policy on Academic Heads (section 7) and AP8 policy on Deans Extension (section 2 and 6). In addition, these guidelines support UBC's mandate from the Ministry of Post-Secondary Education and Future Skills to "review all existing programs and initiatives to ensure programs remain relevant, efficient, sustainable, grow the economy, and help keep costs low for British Columbians."

Purpose

External reviews provide an appraisal of the present and potential state of the Faculty/Unit across all areas, including the range, depth, and quality of the operations and programs; scholarship; pedagogy; professional activities; and academic programs. External reviews are essential to fulfilling our commitments to the BC Ministry of Post-Secondary Education and Future Skills, allow Senior University Leadership to conduct high-level assessments and build awareness of the work being done across the university, advance the mission of the academic unit/Faculty and University as a whole, and provide a streamlined opportunity for Academic Units, Schools, Departments, Faculties and Colleges to develop new or updated strategic plans.

External reviews provide a clear understanding of the following:

- Strategic alignment to university and Faculty or academic unit-level strategic plans (depending on whether it is a Faculty-level or academic unit-level review)
- Quality of educational leadership, instruction, research, service and outreach
- Quality of students' education (undergraduate and graduate) and preparation for society and careers

- Evaluation of strengths and challenges across all unit administrative operations and student services
- Role within UBC and effectiveness in fulfilling that role
- Strategic objectives and the changes necessary to achieve them.

Scope

External Reviews are completed at either a Faculty/College or Academic Unit (e.g., Department, School, or Division) level. Academic Unit-level reviews focus on granular details of academic programs as well as detailed reflections on research/scholarship, teaching and learning, and service, while Faculty-level reviews summarize Academic Unit-level reviews, reflect on research, scholarship, teaching and learning, and service across the Faculty, and link the Faculty's work to University-level strategic plans. For non-Departmental Faculties (e.g., the Faculty of Management), programs, units and Faculty review is completed or units in cross-campus Faculties (e.g., the Okanagan School of Education, the UBCO School of Engineering) will complete reviews as per their Dean's instructions. Academic Units with interdisciplinary programs (ex., the Bachelors of Sustainability which is interdisciplinary between the Faculty of Science, Faculty of Arts, and Faculty of Creative and Critical Studies) will collaborate with their partner units during their external review, while approaching the review from the lens of their independent Academic Unit.

Academic Unit External Reviews are built around a strategic framework (e.g., an academic unit-level strategic plan, a SWOT or SOAR analysis) and focus on granular details of:

- Undergraduate, and graduate programs, non-credit, non-degree
- Research, Scholarship and Professional Activity
- People, leadership and governance
- Physical infrastructure and facilities
- Financial resources
- Future planning

Faculty External Reviews are built around a strategic framework (e.g., a faculty-level strategic plan, a SWOT or SOAR analysis), link to university-level strategic plans (e.g., UBC Strategic Directions 2025-2030, UBC Strategic Equity and Anti-Racism Framework, UBC Indigenous Strategic Plan), and serve to summarize the entire Faculty, including any Academic Unit-level external reviews, focusing on higher-level details of:

- Academic programs overview
- Research, Scholarship and Professional Activity
- People, leadership and governance
- Financial resources
- Future planning

Goals

The Institution and its Faculties and academic units are committed to ensuring and continuously improving the quality of their academic programs and their learning and research environment as well as the adequacy of resources to support the following goals:

- To ensure high quality teaching and learning for all students at UBC
- To continue and enhance the highest quality of scholarship and research at UBC
- To enrich student engagement and opportunities for development
- To establish a culture of wellbeing across academic and learning communities
- To embed Indigenous and globally diverse perspectives at all levels of University governance, teaching, and research
- To incorporate accessible, equitable and inclusive principles and practices at all levels of University governance, teaching, and research
- To cultivate a culture of innovation and inclusive excellence, critical self-evaluation and reflection, and continuous learning and improvement
- To ensure the alignment of the academic unit with the University's mission
- To facilitate accountability of academic units

This guidelines document supports the UBC Okanagan academic community in conducting external reviews of Faculties, Colleges or Institutes governing academic programs. External reviews are normally conducted every five to seven years and aligned with the appointment or appointment extension of a Dean.

Ideally, the work done on an External Review will complement and support other work done in the Academic Unit/Faculty, including:

- Accreditation applications and reports
- Development of Unit/Faculty Strategic Plans
- Annual UBC Strategic Equity and Anti-Racism (StEAR) and Indigenous Strategic Plan (ISP) reports
- Senate/Ministry proposals for new programs or program revisions
- Funding proposals (e.g., seat funding, capital investment for new projects, donors)
- UBCO Strategic Space Committee proposals

Engagement

When completing an external review, the Academic Unit/Faculty is encouraged to engage with current students, alumni, employers of graduates, community partners including indigenous partners, industry partners involved in research, scholarship and/or teaching. This can be done using surveys, focus groups, open houses, town halls, or other forms of engagement.

The UBC Community Engagement Office provides guidelines, toolkits, and support for connecting with community partners.

The Senior Advisor to the Deputy Vice-Chancellor on Indigenous Affairs supports Indigenous engagement at UBC Okanagan. Please reach out to the Provost's Office for more information.

External review deliverables

- Self-Study report
- Terms of Reference document
- External Review Committee report
- Unit's response to the External Review Committee report, action plan, and summary for Senate
- Unit's Two-Year Progress Report

Initiation of the review

The Provost's Office offers support for both Faculty-level and Academic Unit-level External Reviews, including project management and planning, communications, and data collection support.
Per Policy J-305, the Responsible Executive for Faculty-level reviews is the Provost and Vice-President, Academic; the Responsible Executive for Academic Unit-level reviews is the Dean responsible for that unit.

The Responsible Executive determines appropriate timelines for reviews based on relevant milestones (ex., decanal appointments/re-appointments, implementation of new or substantially-changed academic programs, program accreditation reviews); Once the timelines for the review are confirmed, the Provost's Office sends a memo to all members of the unit notifying them of the process, responsibilities, and timelines.

The schedule of reviews is published on the Provost's Office website.

An initial meeting is organized by the Provost's Office between members of the Office and the unit's leadership and administrative staff to:

1. Review expectations of an academic review as per the Ministry, UBC policy, and the Provost's Office
2. Ensure access to relevant documentation from the previous unit's external review
3. Review and discuss this guidelines document package and clarify the process

The initial planning meeting

The Provost's Office meets with the unit leadership to review the purpose, goals and process for the External Review, and outlines the resources available to support the unit in completing the Review. The Provost's Office will support the development of customized guidelines and processes that meet the needs of the Faculty or Academic Unit, for example streamlining requirements for accreditation reviews with External Reviews, while ensuring Senate, Provost Office and Ministry requirements for External Reviews are met.

The Terms of Reference

The Terms of Reference (ToR) document guides the External Review Committee's work by outlining (1) the purpose of the review, (2) background materials including the institutional strategic plans, unit strategic plans, and unit's self-study report, (3) the mandate of the review including guiding questions for the External Review Committee. Faculties/Academic Units are encouraged to customize their Terms of Reference to ensure the External Review Committee focuses on their strategic priorities (e.g., an evaluation of a recently-launched program, a chronic enrollment challenge). The ToR are drafted by the Faculty/Academic Unit under review and are approved by the Dean responsible for the Faculty/Academic Unit. A ToR template, including example guiding questions is found in **Appendix B**.

Units or programs with accreditation reviews may select Terms of Reference questions that are most relevant to them to harmonize their accreditation processes, so as not to duplicate efforts.

The Self-Study Report

The Self-Study Report summarizes the Faculty/Academic Unit's most recent 5 full academic years and serves to provide the External Review Committee with enough relevant information to write their report in accordance with the unit's External Review Terms of Reference. The Self-Study report should be no longer than 50 pages, with a maximum of 300 pages of appendices. Some Faculties/Academic Units will need to abridge their syllabi and/or faculty members' CVs to meet this requirement (or, link to a website or OneDrive file). To abridge CVs, SSHRC application guidelines provide a useful example, recommending consideration of the last 6 years and most salient publications during that time as well as key contributions to research and leadership; most significant contributions; interruptions to career; and contributions to training.

To inform the self-study report, Faculties/Academic Units collect data from the Equity and Inclusion Office (EIO), Planning and Institutional Research (PAIR), Student Evaluation of Instruction (SEI), the Provost and VP Academic Office, the Development and Engagement Office, the Faculty's/Academic Unit's Finance Manager, and the College of Graduate Studies (CoGS). Summaries and highlights from these data are included in the self-study body, while much of it is included in appendices.

The Office of the Provost and VP Academic offers wraparound supports to Faculties/Academic Units as they complete their self-study reports; please reach out to the Senior Manager, Academic Programs and Quality Assurance for more information.

The Academic Unit-Level Self-Study Report

The Academic Unit-level self-study is an opportunity for in-depth examination of the academic programs, and educational leadership, research, scholarly, and/or professional activities at a

granular level. For non-Departmental Faculties (e.g., the Faculty of Management), programs, units and Faculty review is completed or units in cross-campus Faculties (e.g., the Okanagan School of Education, the UBCO School of Engineering) will complete reviews as per their Dean's instructions. Academic Units with interdisciplinary programs (ex., the Bachelors of Sustainability which is interdisciplinary between the Faculty of Science, Faculty of Arts, and Faculty of Creative and Critical Studies) will collaborate with their partner units during their external review, while approaching the review from the lens of their independent Academic Unit.

For accredited programs, the Academic Unit-level review can be customized to streamline the completion of accreditation reviews alongside Academic Unit-level reviews.

To inform the self-study report, Academic Units use data collected in-house, and from the following units. Summaries and highlights from these data are included in the self-study body, while much of it is included in appendices.

- College of Graduate Studies:
  - Graduate Program dashboards shared on SharePoint by Grad Awards staff
- PAIR:
  - Reach out to pair.team@ubc.ca to access Academic Review dashboards
- Finance Manager:
  - Academic Unit annual budget/expenditures for the previous 5 years
- Student Experience of Instruction
  - SEI reports by course and year
- Provost/VP Academic
  - Employment outcomes reports (on request)

Unsure where to find these data? Please reach out to the Senior Manager, Academic Programs and Quality Assurance for support

Introduction / Overview

A 1-2 page précis of key points of the self-study including notable Unit highlights and accomplishments, an infographic or table that summarizes current student, faculty and staff numbers and key categorizations (ex., number of undergraduate and graduate programs, number of research themes, amount of research funding) and an overview of the Unit's strategic goals and priorities.

Strategic Plan

Where available, Units will include a summary of their strategic plan, vision, values and mission. In the absence of a strategic plan, units complete a strategic planning framework such as a Strengths/Weaknesses/Opportunities/Threats (SWOT) analysis or Strengths/Opportunities/Aspirations/Results (SOAR) analysis. This strategic planning forms the framework for the rest of the Self-Study, helping the Unit build a cohesive story for their Self-Study report, and draft relevant Terms of Reference to guide the External Review Committee.

Previous External Review and Subsequent Actions - <date of last review>

A summary of previous review recommendations and subsequent actions taken by the unit.

Non-Credit, Non-Degree, Undergraduate and Graduate Programs

This section examines all academic programming offered in the Unit, including non-credit credentials, certificates, diplomas, undergraduate programs, professional graduate programs and research-based graduate programs. Include for all programs:

- A description of recruitment initiatives and strategies
- Application numbers by program and year
- Admission numbers by program and year
- Enrolment by program and year
- Student retention/attrition and program completion by program and year
- Average student time to degree completion by program
- Demographics (by sex/gender, domestic vs. international, Indigenous) by program and year if available
- Average class sizes by program and year
- Student : faculty ratio by program and year
    - This number represents the relationship between the total number of students and total number of faculty, using the formula [number of students] / [number of faculty]. Annual student and faculty numbers are reported by PAIR.
- Awards and recognition
- Summaries of student experience
    - Each unit will collect this data differently; strategies may include summarizing results of the Student Experience of Instruction, employment outcomes surveys available from the Provost's Office, or unit-led engagement with current students and alumni (via focus groups, surveys, town halls, open houses, etc.)
- A summary of student funding, including where graduate student funding comes from, how competitive students are for awards (especially graduate student awards), and how internal awards and funding are distributed to both undergraduate and graduate students
- A summary of employer satisfaction with graduates of the Academic Unit's programs if available
- Student advising available to students (within and outside of the Academic Unit)
- Student health and wellbeing initiatives and resources available to students (within and outside of the Academic Unit)
- Student appeals processes
- A list of Degree and/or Program Learning Outcomes
- A curriculum map, linking courses to Degree/Program Learning Outcomes (see **Appendix D** for an example Curriculum Map).

Not sure what's expected? Need clarification?
Please reach out to the Senior Manager, Academic Programs and Quality Assurance

    - NOTE: the UBCO Curriculum MAP and Syllabus Generator can be used to create a curriculum map.
- A summary of how student achievement of the Degree/Program Learning Outcomes is assessed and evaluated
- A description of the mode of delivery of each program (e.g., in person, online, hybrid; experiential learning, community-service learning; laboratories, seminars)
- A summary of how student supervision/mentorship and progression are tracked and supported, particularly for graduate students
- A self-reflection on the quality of teaching, learning, and the student experience
- A summary of academic program-related relationships with key partners (e.g., Indigenous communities/organizations/Nations, alumni, health authorities, governments, K-12 schools, other post-secondary institutions, employers, local industry)
- A summary of how each program aligns with the Ministry's Degree Level Standards

Research, Scholarly and Professional Activity

This section examines all research, scholarly and professional activity completed in the Unit. It includes:

- Research funding by source and by year
- The number of postdoctoral fellows, by discipline (if relevant) and year
- A summary of postdoctoral fellow funding, including funding sources and how competitive postdoctoral fellows are for awards
- Average research funding per full-time tenure-track research faculty member by year
- An overview of the research, scholarly, and professional activities in the Academic Unit
- A description of relationships with other academic units and institutions (e.g., participation in research clusters, institutes, and other intra- and inter-institutional collectives)
- A description of contributions to non-academic sectors (e.g., inputs into government policy, patents, startups, book publications)
- A summary of research/scholarly/professional relationships with key partners (e.g., Indigenous communities/organizations/Nations, alumni, health authorities, governments, K-12 schools, other post-secondary institutions, employers, local industry)
- A summary of research and scholarly outputs (e.g., publications, presentations)
- A summary of research, scholarly, and/or professional recognitions and/or awards

Educational Leadership

This section examines all research, scholarly and professional activity completed in the Unit. It includes:

- The number of educational leadership faculty in the Unit by rank
- A summary of notable projects and funding for educational leadership (e.g., Aspire Learning Transformations Fund/ALT-2040 Grants)
- A summary of notable recognition and awards for educational leadership (e.g., Dr. Claire

Budgen Golden Apple Awards, I Am Accessible Awards, Outstanding Instructor Awards, Provost's Award for Teaching Excellence and Innovation Awards, Killam Teaching Prize, 3M National Teaching Fellowship Awards)
- A summary of the Unit's educational leadership activities (e.g., curriculum revision or development, knowledge translation or mobilization initiatives)
- A summary of educational leadership relationships with key partners (e.g., Indigenous communities/organizations/Nations, alumni, health authorities, governments, K-12 schools, other post-secondary institutions, employers, local industry)
- A summary of educational leadership priorities and future directions (e.g., new hires, program revisions, new programs)

People, Leadership, Culture and Governance

This section describes Unit-level leadership and governance organization, demographics, and culture. Where possible, this section describes how governance and decision-making is transparent and shared, any strategies used to build a diverse leadership group and faculty/staff roster, and any communications strategies utilized by the Unit. This section includes:

- Numbers of faculty members by rank and category (tenure-track educational leadership and research faculty members, lecturers, sessional lecturers, teaching postdoctoral fellows, teaching assistants, post-doctoral fellows and research associates)
- Number of staff members, by category (Clerical, Secretarial & Library Assistants, Management & Professional, Trades, Service & Technical and Other staff)
- A description of how students (undergraduate and graduate) and postdoctoral fellows are involved in the Unit's activities (e.g., hiring, *ad hoc*, and standing committee membership, events, communications)
- The ratio of staff to faculty members by year
- A description of the Unit-level governance, committee structure and membership, organizational structure, leadership structure, and/or administrative structure of the Faculty (e.g., Org Charts, Committee Terms of Reference)
- Any Unit-level policies or processes related to human resources (e.g. hiring, recognition, tenure and promotion, assessing merit, workload allocation, performance evaluation)
- A summary of opportunities for professional development and mentorship for both faculty (including post-doctoral fellows) and staff
- A summary of communication strategies (e.g., newsletters, distribution lists, channels and responsibilities, technology such as SharePoint or social media) and opportunities for connection in the Unit (e.g., meetings, gatherings, events, socials)
- A description of the culture of the Unit, incorporating qualitative (e.g., focus groups or interviews) and quantitative data (e.g., results from the Equity and Inclusion Office's Employee Experiences Survey, Unit-level surveys)
- A summary of priorities and future directions related to people, culture, leadership, and governance (for example, strategic hires, re-organizations, leadership changes)

Physical Infrastructure / Facilities

This section describes the range, quality, and accessibility of the Unit's teaching, research and administrative spaces and equipment. The purpose is to allow reviewers to evaluate if the space and infrastructure (1) meet the current needs of the Unit, and (2) support the anticipated growth, ensuring accessibility and inclusion for all. This section includes:

- A summary of the space used for administrative (e.g., work stations, offices, meeting rooms), teaching (e.g., classrooms, laboratories, seminar rooms), and research (e.g., offices, laboratories) purposes
- A summary of the technology and specialized equipment used for teaching and research purposes
- A summary of any Unit-, Faculty- or University-provided spaces used by undergraduate students, graduate students and postdoctoral fellows
- A description of health and safety requirements (e.g., chemical and biological safety)
- A summary of any Unit-, Faculty- or University-provided spaces used to support members of historically, systemically and persistently marginalized groups.
- A summary of priorities and future directions related to physical infrastructure and facilities (e.g., new research equipment, CFI applications, office relocations, new programs that require additional space)

Financial Resources

This section outlines the Unit's financial resources and describes its current financial health, along with any anticipated or forecasted changes to its financial health. This section includes:

- A detailed annual budget, outlining expenses and revenue
- A summary of the sources of funding including endowments, tuition including from non-credit programs, funding from external agencies including government, research funding, university funding, endowments, donations and gifts.
- A summary of priorities and future directions related to financials (e.g., forthcoming investments, hiring, changes to workload)

Planning for the Future

This section summarizes the previous section's priorities and future directions, highlighting key priorities for the Unit over its next 5 years and how they connect to other the Faculty's strategic priorities.

The Faculty-Level Self-Study Report

The Faculty-level self-study is an opportunity to reflect on the Academic Unit-level reviews in the broader context of the entire Faculty and the University. It explores the Faculty's strengths, challenges and opportunities with a high-level lens. For non-Departmental Faculties (e.g., the Faculty of Management), programs, units and Faculty review is completed or units in cross-campus Faculties (e.g., the Okanagan School of Education, the UBCO School of Engineering) will

complete reviews as per their Dean's instructions. Academic Units with interdisciplinary programs (ex., the Bachelors of Sustainability which is interdisciplinary between the Faculty of Science, Faculty of Arts, and Faculty of Creative and Critical Studies) will collaborate with their partner units during their external review, while approaching the review from the lens of their independent Academic Unit.

To inform the self-study report, Faculties use any available Academic Unit-Level External Reviews, UBC Strategic Priorities 2025-2030, the UBC Wellbeing Strategic Framework, the UBCO Academic Priorities, annual UBC Strategic Equity and Anti-Racism (StEAR) reports, annual UBC Indigenous Strategic Plan (ISP) reports, and data from the Equity and Inclusion Office (EIO), Planning and Institutional Research (PAIR), the Development and Engagement Office, and the Faculty's/Academic Unit's Finance Manager. Summaries and highlights from these data are included in the self-study body, while much of it is included in appendices.

- Academic Unit-level external reviews (if available)
- Indigenous Strategic Plan
- Faculty ISP annual progress reports
- UBC Strategic Priorities 2025-2030
- UBC Wellbeing Strategic Framework
- UBCO Academic Priorities
- EIO:
    - Faculty-level Employment Equity Census
    - StEAR annual progress reports
- PAIR:
    - Reach out to pair.team@ubc.ca to access Academic Review dashboards
- Finance Manager:
    - Faculty annual budget/expenditures for the previous 5 years
- Development and Engagement office:
    - Faculty-level donors/funding

Unsure where to find these data? Please reach out to the Senior Manager, Academic Programs and Quality Assurance for support

Introduction / Overview

A 1-2 page précis of key points of the self-study including notable Faculty highlights and accomplishments, an infographic or table that summarizes current student, faculty and staff numbers and key categorizations (ex., number of Schools or Departments, number of research centres/institutes, amount of research funding) and an overview of the Faculty's strategic goals and priorities.

Strategic Plan

Where available, Faculties will include a summary of their strategic plan, vision, values and mission. In the absence of a strategic plan, Faculties complete a strategic planning framework such as a Strengths/Weaknesses/Opportunities/Threats (SWOT) analysis or Strengths/Opportunities/Aspirations/Results (SOAR) analysis. This strategic planning forms the

framework for the rest of the Self-Study, helping the Faculty to link to University strategic plans and build a cohesive story for their Self-Study report, and draft relevant Terms of Reference to guide the External Review Committee.

Previous External Review and Subsequent Actions - <date of last review>

A summary of previous review recommendations and subsequent actions taken by the Faculty, including those from previous Faculty-level and Academic Unit-level external reviews.

Academic Programs Overview

Fulsome reviews of academic programs are completed in Unit-Level External Reviews. For Faculty-level reviews summarize and build on Unit-Level reviews by synthesizing relevant sections from annual UBC Indigenous Strategic Plan (ISP) and Strategic Equity and Anti-Racism (StEAR) reporting, and linking the Faculty's work to UBC Okanagan Academic Priorities and UBC Strategic Directions 2025-2030. This section includes:

- A summary of programs and/or broader areas of academic expertise
- A summary of the following data for non-credit credentials, non-degree programs (certificates, diplomas), undergraduate programs, and graduate programs:
    - Application numbers
    - Admission numbers
    - Enrolment numbers
    - Student retention and program completion rates
    - Demographics (by sex/gender, domestic vs. international, Indigenous)
    - Average class sizes
- Degree and/or Program Learning Outcomes
- A self-reflection on student experience and career outcomes across programs as reported in the Unit-Level Reviews
- A summary of academic services available to students, within the Faculty and across Campus
- Continuing and Professional Education
    - Enrollment
    - Offerings
    - Strategic priorities or areas of growth
- A self-reflection on how academic programs contribute to Unit- and Faculty-Level strategic priorities, mission and values
- A self-reflection relating work done in academic programs within the Faculty to UBC Strategic Priorities 2025-2030, UBCO Academic Priorities, the UBC Indigenous Strategic Plan[1], the UBC Strategic Equity and Anti-Racism Framework[1], and the UBC Wellness Strategic Framework, for example:

Not sure what's expected? Need clarification?
Please reach out to the Senior Manager, Academic Programs and Quality Assurance

[1] Faculties are encouraged to reflect on their annual ISP and StEAR progress reports for this section

    - Developing or reviewing and improving student supports, admissions processes and pathways, awards and funding policies.
    - Identifying and removing barriers to participation of historically, systemically and persistently marginalized groups in experiential learning opportunities
    - Incorporating principles of resilience of people, communities, economies and/or environment into curricula
    - Incorporating learning outcomes, assessments and classroom activities that build respect for Indigenous knowledge and other non-traditional/diverse expertise in teaching and learning
    - Building opportunities for students to engage in research, international study, interdisciplinary collaboration, or experiential learning
    - Developing flexible and inclusive options or pathways for students to enter and/or complete programs
    - Co-developing or co-reviewing academic programs with partners within and beyond UBC (e.g., Indigenous communities/organizations/Nations, alumni, health authorities, governments, K-12 schools, other post-secondary institutions, employers, local/regional/national/international industry)
    - Developing opportunities for partners to get involved in teaching, mentoring, or precepting
- A summary of priorities and future directions related to academic programs (e.g., program revisions, new programs)

Research, Scholarly and Professional Activity Overview

Fulsome reviews of research, scholarly and professional activity are completed in Unit-Level External Reviews; Faculty-level Reviews summarize and build on Unit-Level reviews by synthesizing relevant sections from annual UBC Indigenous Strategic Plan (ISP) and Strategic Equity and Anti-Racism (StEAR) reporting and linking the Faculty's work to UBC Okanagan Academic Priorities and UBC Strategic Directions 2025-2030. This section includes:

- Research funding data by source and by year
- A description of research units of significant note within the unit (e.g., Centres and Institutes)
- The number of Canada Research Chairs and Principal's Research Chairs in the Faculty
- A self-reflection on research priorities, goals, challenges, and opportunities
- A self-reflection relating work done in the Faculty related to academic programs to UBC Strategic Priorities 2025-2030, the UBC Indigenous Strategic Plan, the UBC Strategic Equity and Anti-Racism Framework, and the UBC Wellness Strategic Framework, for example:
    - Co-development of research protocols with community
    - Incorporating DORA (San Francisco Declaration on Research Assessment) principals to evaluate research merit when adjudicating for awards, merit, tenure and promotion, including for graduate students

    - Incorporating OCAP (Ownership, Control, Access and Possession) of First Nations data used in research
    - StEAR- or ISP-funded research projects
    - Intentional recruitment of researchers with expertise in equity, inclusion, diversity, accessibility/disability justice, or Indigenist methodologies
    - Knowledge Translation/Mobilization research projects and initiatives
    - Meaningful and reciprocal relationships between researchers and partners within and beyond UBC (e.g., Indigenous communities/organizations/Nations, alumni, health authorities, governments, K-12 schools, other post-secondary institutions, employers, local industry)
    - Research involving the development of and ethical implementation and use of emerging technologies, including AI
- A summary of priorities and future directions related to research/scholarly/professional activities (e.g., targeted hires, CFI applications)

Educational Leadership Overview

Fulsome reviews of Educational Leadership are completed in Unit-Level External Reviews Faculty-level Reviews summarize and build on Unit-Level reviews by synthesizing relevant sections from annual UBC Indigenous Strategic Plan (ISP) and Strategic Equity and Anti-Racism (StEAR) reporting and linking the Faculty's work to UBC Okanagan Academic Priorities and UBC Strategic Directions 2025-2030. This section differs from the Academic Programs section by describing initiatives actively developed and/or implemented within the past 5 years in the Faculty with impacts felt beyond one individual classroom, while the Academic Programs section describes the passive current state of individual programs/classrooms. This section includes:

- A self-reflection relating work done in the Faculty related to academic programs to UBC Strategic Priorities 2025-2030, the UBC Indigenous Strategic Plan, the UBC Strategic Equity and Anti-Racism Framework, and the UBC Wellness Strategic Framework, for example:
    - Development/implementation and assessment of novel teaching approaches that have demonstrated impact on student learning, progression, degree completion, and/or post-graduate outcomes (e.g., employment, future study)
    - Development of novel experiential learning activities (e.g., practicum, community-service learning, or work-integrated learning)
    - Curricular review or development projects to incorporate themes such as diverse ways of knowing, interdisciplinarity, or sustainability
    - Development of partnerships with local First Nations or other organizations to shape teaching and learning
    - Progress towards UBC ISP Goal #4 – Indigenizing our Curriculum
    - Development of Faculty-wide principals for implementing Universal Design for Learning in the classroom
    - Building relationships with partners to work towards creating discrimination-free

experiential education opportunities
    - Development/implementation of educational resources on gender diversity and inclusion in the classroom
- A summary of priorities and future directions related to educational leadership activities, (e.g., new hires, educational leadership projects planned or underway)

People, Leadership, Culture and Governance

This section describes Faculty-level leadership and governance organization, demographics, and culture, breaking down by disciplinary area or Academic Unit if relevant. Where possible, this section describes how governance and decision-making is transparent and shared, any strategies used to build a diverse leadership group and faculty/staff roster, and any communications strategies utilized by the Faculty. This section includes:

- Numbers of faculty members, by disciplinary area or Academic Unit if relevant, including educational leadership and research faculty members, lecturers, sessional lecturers, teaching postdoctoral fellows, teaching assistants, post-doctoral fellows and research associates. Include demographic data on gender and age where available
- Number of staff members, by disciplinary area or Academic Unit if relevant, including Clerical, Secretarial & Library Assistants, Management & Professional, Trades, Service & Technical and Other staff. Include demographic data on gender and age where available
- A description of how students (undergraduate and graduate) and postdoctoral fellows are involved in the Faculty's activities (e.g., hiring, *ad hoc*, and standing committee membership, events, communications)
- The ratio of staff to faculty members by year
- A description of the Faculty-level governance, committee structure and membership, organizational structure, leadership structure, and/or administrative structure of the Faculty (e.g., Org Charts, Committee Terms of Reference)
- Any Faculty-level policies or processes related to human resources (e.g., hiring, recognition, tenure and promotion, assessing merit, workload allocation, performance evaluation)
- A summary of opportunities for professional development and mentorship for both faculty (including post-doctoral fellows) and staff
- A summary of communication strategies (e.g., newsletters, distribution lists, technology such as SharePoint or social media) and opportunities for connection in the Faculty (e.g., meetings, gatherings, events, socials)
- A description of the culture of the Faculty, incorporating qualitative (e.g., focus groups or interviews) and quantitative (e.g., results from the Equity and Inclusion Office's Employee Experiences Survey, Faculty-level surveys) data
- A self-reflection relating work done in the Faculty related to academic programs to UBC Strategic Priorities 2025-2030, the UBC Indigenous Strategic Plan, the UBC Strategic Equity and Anti-Racism Framework, and the UBC Wellness Strategic Framework, for example:

    - Mandating UBC Equity and Inclusion Office Employer Equity Advisor training for members of hiring committees
    - Reviewing job postings with an anti-racist and anti-ableist lens
    - Targeted recruitment of special populations in accordance with the BC Human Rights Code
    - Developing/implementing initiatives that support the retention of staff and faculty from historically, persistently and systemically marginalized groups
    - Identifying and removing barriers to full participation of people of all abilities in the workplace
    - Reviewing graduate student admissions processes with an anti-racist and anti-ableist lens
    - Development/implementation of training on accessibility, cultural safety, or inclusion in the workplace
    - Development/implementation of policies related to recruitment, retention and advancement of Indigenous faculty and staff
    - Reviewing Faculty policies and operational practices to ensure they support the recognition of human rights and the equity and inclusion of faculty, staff, students, and community members, with particular attention to those which impact people with Indigenous identities
    - Implementing zero-tolerance policies for discrimination, racism, cultural or sexual violence of any form against students, faculty, staff, and community members, with particular attention to impacts on people with Indigenous identities
- A summary of priorities and future directions related to people, culture, leadership, and governance (e.g., strategic hires, re-organizations, leadership changes)

Physical Infrastructure / Facilities

This section describes the range, quality, and accessibility of the Faculty's teaching, research and administrative spaces and equipment. The purpose is to allow reviewers to evaluate if the space and infrastructure (1) meet the current needs of the Faculty, and (2) support the anticipated growth, ensuring accessibility and inclusion for all. This section includes:

- A summary of the space used for administrative (e.g., work stations, offices, meeting rooms), teaching (e.g., classrooms, laboratories, seminar rooms), and research (e.g., offices, laboratories) purposes
- A summary of the technology and specialized equipment used for teaching and research purposes
- A summary of any Faculty- or University-provided spaces used by undergraduate students, graduate students and postdoctoral fellows
- A description of health and safety requirements (e.g., chemical and biological safety)
- A summary of any Faculty- or University-provided spaces used to support members of historically, systemically and persistently marginalized groups.

- A self-reflection relating work done in the Faculty related to physical infrastructure/facilities to UBC Strategic Priorities 2025-2030, the UBC Indigenous Strategic Plan, the UBC Strategic Equity and Anti-Racism Framework, and the UBC Wellness Strategic Framework, for example:
    - Prioritizing Indigenous vendors by using the UBC Indigenous Suppliers list
    - Engaging with the host nation (syilx/Okanagan Nation) during design, development and renovation of Faculty spaces
    - Ensuring students, staff and faculty – especially with Indigenous identities – are aware of and have access to culturally significant spaces and/or spaces to practice and celebrate their cultures
    - Explore leveraging existing UBC infrastructure to support Faculty needs before investing in new infrastructure
    - Engage in campus-wide initiatives related to the built environment, such as the Okanagan Campus Plan, the Land Use Plan, and Neighborhood plans
- A summary of priorities and future directions related to physical infrastructure and facilities (e.g., new research equipment, CFI applications, office relocations, new programs that require additional space)

Financial Resources

This section outlines the Faculty's financial resources and describes its current financial health, along with any anticipated or forecasted changes to its financial health. This section includes:

- A detailed annual budget, outlining expenses and revenue
- A summary of the sources of funding including endowments, tuition including from non-credit programs, funding from external agencies including government, research funding, university funding, endowments, donations, and gifts.
- A summary of priorities and future directions related to financials (e.g., forthcoming investments, hiring, changes to workload)

Planning for the Future

This section summarizes the previous section's priorities and future directions, highlighting key priorities for the Faculty over its next 5 years and how they connect to other UBC strategic plans, frameworks and priorities.

Appendices may include:

1. Tables, charts, and graphs that do not fit well in the body of the self-study (e.g., SEI reports, research funding reports)
2. Roster of faculty members with links to their CVs
3. Committee Terms of Reference
4. Policies, processes and procedures
5. Course syllabi
6. Previous external reviews
7. Accreditation reports

The External Review Committee

The External Review Committee is comprised of approximately 2-4 individuals (exact number is determined by the academic unit/Faculty) from outside of UBC Okanagan. The External Review Committee should span the academic unit's/Faculty's research and teaching interests, and include individuals with experience in the development and delivery of undergraduate and graduate curricula and programs who also represent a diversity of lived experiences, any required or desired professional credentials, and/or related work experience. Professional programs may also include a member from the relevant professional committee in their External Review Committee.

The External Review Committee (1) reviews the Self-Study and Terms of Reference, (2) attends a site visit over 2-3 days, and (3) writes an External Review Committee Report, summarizing key points of the Self-Study, site visit, and recommendations from the Committee.

Reviewers receive an honorarium for their participation (suggested: $600 per day or $1,200 total) and support for travel and accommodations, funded by the unit's Dean's Office. Please reference the UBC Business Expense Policy FM8 for information on these expenses.

Potential reviewers may be sent an informal invitation to participate in the early stages of forming the External Review Committee; for Faculty-level reviews, the Provost's Office sends the confirmed reviewers a formal invitation to participate in the External Review. For Unit-level reviews, the formal invitation is sent by the Dean's Office (see **Appendix C** for sample letter).

Choosing External Review Committee members

Once the review has been initiated, the Dean's Office and the unit/Faculty under review begin to identify potential reviewers for consideration. The memo sent by the Provost's Office notifying all unit/Faculty members of the external review and timelines includes instructions for submitting suggestions for external reviewers to their Dean's Office.

All suggestions for potential reviewers should be considered by the Dean's Office, in consultation with the leadership of the unit under review. When generating a list of reviewers, consider the following:

- Academic leadership from peer institutions, Faculties or departments;
- Relevant academic experience in quality assessment and enhancement, research, curriculum design, teaching and learning, and administration;
- Any required or desired professional credentials and/or related work experience;
- Understanding of the BC post-secondary educational context;
- Potential conflicts-of interest;
- Members of internal and external Indigenous communities;
- Equity Representation of diverse lived experiences and perspective across historically,

persistently and systemically marginalized groups;
- Understanding of competency-based education or expertise in the development and delivery of undergraduate/graduate curricula within the disciplinary context.

Internal observers/reviewers: Some units may choose to invite a UBC observer or reviewer to join the review team; this reviewer can serve in place of one external. A UBC Okanagan observer (external to the unit/Faculty under review) can contribute to the review by contextualizing conversations and discussions that take place during the site visit and answering questions that may come up during the writing of the reviewers' report.

A UBC reviewer can be invited from the Vancouver campus (external to UBC Okanagan), when the unit/Faculty under review deems such participation would be valuable for their assessment, planning and strategic visioning.

Conflict of interest: Reviewers must have an appropriate level of separation from the unit/Faculty under review. Reviewers should not be research partners with unit/Faculty members or served in a supervisory role for a unit member. Further details can be found in UBC's Conflict of Interest and Commitment policies.

Faculty/College reviews: The Faculty's Dean provides to the Provost and VP Academic a list of suggested reviewers' names with their contact information, academic rank, and a synopsis of academic qualifications and field(s) of expertise for approval.

Academic Units within Faculties: The Head or Director provides to the Dean a list of suggested reviewers' names with their contact information, academic rank, and a synopsis of academic qualifications and field(s) of expertise for approval.

Department, Institute, Centre, or similar: The Dean shares the list of External Review Committee members along with a summary of their biography and any relevant information to the Office of the Provost and VP Academic.

Pre-site visit orientation

The Responsible Executive for the External Review meet with the External Review Committee remotely 2-3 weeks in advance of the site visit to contextualize the review, clarify expectations, review the Terms of Reference, and confirm the site visit schedule. The Dean (or delegate) is the Responsible Executive for Unit-level external reviews, and the Provost is the Responsible Executive for Faculty-level external reviews.

The site visit

Site visits are typically held over two to three days, depending on the size of the unit. A sample site visit schedule is found in **Appendix E**. A sample site visit checklist can be found in **Appendix F**.

Accessibility is for everyone, not just people with disabilities; organizers are encouraged to reference the UBC Accessible Events Guide for support with setting up an accessible and inclusive site visit.

The site visit provides opportunities for the External Review Committee to engage with the unit's/Faculty's staff, faculty, students, post-doctoral fellows, leadership, and community partners along with campus leadership. The Terms of Reference should be used to guide the discussions.

A project lead (in the Dean's Office or the unit under review) should be appointed to take responsibility for the site visit logistics, including the timing/schedule, accommodations, travel, on-campus meeting rooms, catering, processing expenses and payment of honoraria (review UBC's reimbursement policy).

If the visit is done online due to health-related restrictions, other considerations should be considered, such as platform, privacy and technical support.

The following groups and individuals are typically involved in the site visit:

Unit-Level Reviews	**Faculty-Level Reviews**
Provost and Vice-President Academic	Deputy Vice-Chancellor and Principal
Associate Provosts	Provost and Vice-President Academic
Faculty Dean	Associate Provosts
Faculty Associate Dean(s)	Vice-Principle, Research and Innovation
Academic Unit/School/Department Director or Head	Associate Vice-President, Finance and Operations
Additional Unit leadership (Associate Director, Assistant Director, Program Coordinators or Directors)	Associate Vice-President, Students
Faculty (tenured and tenure-track professoriate, lecturers, sessional lecturers, postdoctoral fellows)	Associate Vice-President, University Relations
Key administrative and support staff in the unit (M&P staff, Student Academic Services, Admissions, Awards, Student Affairs, Finance, Development, Co-op, IT, etc.)	Senior Advisor to the DVC on Indigenous Affairs
Students (undergraduate students, graduate students, student union representatives)	Executive Director, Development and Alumni Engagement
	Faculty Dean
	Faculty Associate Dean(s)
	Faculty (tenured and tenure-track

	professoriate, lecturers, sessional lecturers, postdoctoral fellows)
	Key administrative and support staff in the unit (M&P staff, Student Academic Services, Admissions, Awards, Student Affairs, Finance, Development, IT, etc.)
	Additional Unit leadership (Associate Director, Assistant Director, Program Coordinators or Directors)
	Students (undergraduate students, graduate students, student union representatives)

Some Units/Faculties may also wish to involve adjunct faculty members, members of internal or external advisory committees, members of relevant professional associations, alumni, community or industry partners.

The External Review Committee Report

The External Review Committee Report summarizes the Self-Study, Site Visit, and outlines the External Review Committee's responses to the questions posed in the Terms of Reference, and summarizes their recommendations. The External Review Committee works together to write this report, and sends their first draft to the unit's Head/Director (for unit-level reviews) or Dean (for Faculty-level reviews), who reviews the External Review Committee Report for factual errors and sends back any necessary revisions.

The External Review Committee reviews the factual corrections from the Head/Director or Dean, makes any necessary changes, and submits the final report to the Head/Director (for unit-level reviews) or Dean (for Faculty-level reviews) **within 30 days of the site visit**.

A copy of the final Report is forwarded to the Provost's Office and the Dean of the College of Graduate Studies (if the unit includes a graduate program).

The Unit/Faculty Response and Implementation Plan

Based on the recommendations outlined in the External Review Committee Report, the Unit Head/Director or Dean prepares a 4-6 page Unit Response and Implementation Plan **within 3 months of the site visit**. The Plan should be informed by the same community and unit members who participated in the Self-Study (i.e., students, alumni, community partners, employers, etc.). A Response and Implementation Plan template is found in **Appendix G**.
The Unit Response and Implementation Plan is sent to the Provost's Office, and a 2-page summary is prepared by the Provost's Office for the Okanagan Senate.

External Review Progress Report

Two years after submission of the Unit Response and Implementation Plan, the unit Head/Director or Dean prepares a Progress Report reflecting on the unit's successes and challenges in meeting the External Review Committee's recommendations. A Progress Report Template is found in **Appendix H.**
The Progress Report is submitted to the Provost's Office, the Office of the Senate and, where the unit under review has a graduate program, the Dean of the College of Graduate Studies.
The academic unit Head/Director or Dean shares the Progress Report, or a summary of it, with all academic unit members and engaged parties, internal and external to the academic unit. This includes, but is not limited to, faculty, students, staff, alumni, and community groups.

List of Appendices

A. Sample Project Timeline
B. Sample Terms of Reference
C. Email template to invite external reviewers
D. Example of a curriculum map
E. Site visit schedule example and checklist
F. Response and Action Plan template
G. Progress Report template

Appendix A: Sample Project Timeline

Activity	Lead(s)	Timeline
Initiation of review: ToR and selection of reviewers		
The Provost's Office confirms the Unit's participation in the External Review Process	Provost's Office	The spring prior to the academic year of the scheduled external review
Initial Planning meeting (Unit leadership and Provost's Office) to create Engagement Plan, Communications Plan, Data Collection Plan, and Project Timeline.	Provost's Office	July
Begin Data Collection	Unit	August
Select External Review Committee	Unit	August
Book Site Visit and pre-site visit orientation	Unit	September
Self-Study report		
Notification of External Review is sent to all unit members (staff, faculty, and students)	Provost's Office	September
Complete SOAR	Unit	October
Begin drafting Self-Study Report	Unit	September
Distribute Self-Study Report draft to unit members for feedback	Unit	December
Send final Self-Study Report to reviewers and cc Provost's Office	Unit	January
Site visit		
Pre-site visit orientation meeting	Unit	January (2 weeks prior to the site visit)
Site Visit	Unit	February
External Review Committee Report draft	External Review Committee	February/March
Review the draft External Review Committee Report for factual errors	Unit	March
Final External Review Committee Report sent to the Head/Director or Dean, cc Provost's Office	External Review Committee	March (within 30 days of the site visit)
Process honoraria	Unit	March
Response, action plan and summary		
Complete Unit Response and Implementation Plan, sending a copy to the Provost's Office	Unit	May (within 3 months of the site visit)
Complete a 2-page summary of the Unit Response and Implementation Plan, submit to Senate	Provost's Office	May

Follow-up and progress update		
Update website with review documents	Provost's Office	June
Final archival review and associated files	Provost's Office, Senate and Unit	July
Complete External Review Progress Report, submit to the Provost's Office	Unit	2 years after site visit
Submit External Review Progress Report to Senate and the College of Graduate Studies (if relevant)	Provost's Office	

Appendix B: Sample Terms of Reference

Terms of Reference: UNIT/FACULTY NAME Review

Purpose of the Review

External reviews provide an appraisal of the present and potential state of the unit across all areas, including the range, depth, and quality of the operations and programs; scholarship; pedagogy; professional activities; and academic programs. Reviews should be designed to reflect on the unit's current state, be forward looking, and advance the mission of the academic unit/Faculty and University as a whole, and articulate a vision for the future. External reviewers are asked to consider all provided documents and their site visit to provide constructive feedback and recommendations for the Academic Unit/Faculty under review.

Background Materials

In addition to their experiences at the site visit, the External Review Committee should reference the following documents in their review:

- Shaping UBC Okanagan's Future: Outlook 2040
- UBC Strategic Priorities 2025-2030
- The UBC Indigenous Strategic Plan
- The UBC Strategic Equity and Anti-Racism Roadmap for Change
- UBC Okanagan Academic Priorities
- The BC Ministry of Post-Secondary Education and Future Skills Degree Level Standards
- The UNIT/FACULTY NAME Self-Study Document

Mandate

The External Review Committee will consider all relevant documents and materials and will visit the campus in order to interview faculty members, staff, students, and postdocs as well as relevant administrators. The Committee will submit a final report to ubco.provost@ubc.ca within 30 days of the site visit, ensuring the Academic Unit/Faculty under review has an opportunity to proofread a draft of the report and correct any factual errors.

Without limiting its overall mandate, the External Review Committee should consider the following guiding questions as reflective of the current state of the Faculty/Academic Unit and the future opportunities and plans it has outlined for development:

[Faculties/Academic Units are encouraged to use and/or modify the following example guiding questions below. For clarity, it is encouraged to keep the subheadings as-is, as they match with the subheadings within the Self-Study document.]

Ex 1 - Academic Unit-Level External Reviews:

- Progress from previous reviews:
    - How well has the unit progressed on the previous recommendations?
    - Did these changes appear to result in improvements in priority areas?
    - Which new priority areas have emerged since the last series of recommendations?
- Operations:
    - How does the working environment, morale and culture of the unit contribute to achieving their goals?
    - Does the unit embed equity for and inclusion of people from diverse historically, systemically and persistently marginalized community into policies and procedures? If so, how?
- Embedding of the Indigenous Strategic Plan and incorporating principles of accessibility, equity, diversity, and inclusion:
    - Is the unit aware of their commitments to the UBC ISP/StEAR? Are they making progress towards them? Do they receive recognition for it (e.g., awards, publications, mentions in teaching evaluations?)
    - Has the unit responded to changes in societal expectations, internationalization, and public support for inclusion and accessibility?
- Adequacy and effective use of resources (physical, technological, financial and human):
    - Does the Unit have sufficient resources to support its priorities (provided either within the Unit, or available to the Unit)? Which, if any, resources are lacking?
    - Are staff and faculty aware of resources available to them, and do they engage with the resources? If not, what are the barriers to engaging with the available resources?
- Value to students' education (undergraduate and graduate) and preparation for future study or careers:
    - Do current students and alumni report satisfaction with their degrees?
    - Do alumni find jobs in their fields?
    - Do students graduate on time?
- Quality of instruction, research, and service or outreach:
    - Is the Unit well-balanced across instruction, research, and service/outreach activities?
    - Are researchers adequately funded?

These questions are provided as a guide and units are encouraged to modify to align with their own contexts, goals and strategic priorities
Please reach out to the Senior Manager, Academic Programs and Quality Assurance with any questions

    - Are faculty members considered leaders within their fields of research, teaching, or service/outreach?
    - What strengths are outlined in student evaluations of teaching? Weaknesses?
    - How does the unit support professional development of faculty, and is it successful?
    - What are the perspectives from graduate students and post-doctoral fellows regarding the quality of their supervision?
- Continuing appropriateness of the program(s) structure, admissions requirements, method of delivery and curriculum for the program's educational goals and standards:
    - Does the program structure align with the Program Learning Outcomes?
    - Does the program structure align with UBC Okanagan Academic Priorities?
    - Does the program structure align with the unit's strategic priorities?
    - Do the admissions requirements sufficiently prepare students to enter first year? Do they align with the Program Learning Outcomes? Could they be modified to improve accessibility to a wider group of students?
    - How does the mode of delivery facilitate student learning? Could it be modified to improve accessibility, or to enhance student learning in any way?
- The embedding of Indigenous and globally diverse perspectives at all levels including engagement with community members:
    - Does the unit engage with Indigenous communities, Nations and organizations? If so, how? What are the perspectives from staff, faculty and students within the unit related to Indigenous engagement?
    - Does the unit engage with global partners? If so, how?
    - What are the perspectives from staff, faculty and students within the unit on how the unit engages with Indigenous partners? With global partners?
- How accessible, equitable and inclusive principles and practices at all levels of teaching are included:
    - Does the unit incorporate inclusion, accessibility, and equity into their curriculum? Into their policies?
    - What are the perspectives from staff, faculty and students within the unit related to accessibility, equity and inclusion in the classroom?
    - Do instructors receive recognition for this work in the classroom (e.g., awards, publications, mentions in teaching evaluations?)
- Connections between any accreditation/regulatory/professional association bodies, the Ministry's Degree Level Standards, Degree/Program Learning Outcomes, Course Learning Outcomes, and Assessments/Evaluations:
    - Are students given the opportunity to achieve all Program Learning Outcomes (i.e., does each Learning Outcome map to a required course?)
    - How are students' fulfillment of the Program Learning Outcomes assessed?

    - Does the program(s) sufficiently meet the BC Degree Level Standards?
    - Does the program(s) sufficiently meet their regulatory/accreditation/professional standards? (if relevant)
- Adequacy of the methods to evaluate student progress and achievement to ensure that the degree level standards have been achieved:
    - What methods are implemented to evaluate student progress and achievement?
    - How are they compared to BC Degree Level standards?
- Where appropriate, the graduate employment rates, graduate satisfaction level, employer satisfaction level, advisory board satisfaction level, student satisfaction level, and graduate rate:
    - Do graduates find relevant jobs? If not, can you find any insights to why, or make recommendations to improve this?
    - Are graduates satisfied with their programs? If not, can you find any insights to why, or make recommendations to improve this?
    - Are employers satisfied with their alumni hires? If not, can you find any insights to why, or make recommendations to improve this?
    - Are current students satisfied with their programs? If not, can you find any insights to why, or make recommendations to improve this?
    - Are students finishing their programs? If not, can you find any insights to why, or make recommendations to improve this?

Ex. 2 - Faculty-Level External Reviews:

- Progress from previous reviews:
  - How well has the Faculty progressed on the previous recommendations?
  - Did these changes appear to result in improvements in priority areas?
  - Which new priority areas have emerged since the last series of recommendations?
- Operations:
  - How does the working environment, morale and culture of the Faculty contribute to achieving their goals?
  - How does the Faculty embed equity for and inclusion of people from diverse historically, systemically and persistently marginalized community into policies and procedures?
- Quality of instruction, research, and service or outreach:
  - Does the Faculty embody, or has it made progress towards, diversifying scholarship and ways of knowing?
  - Does the Faculty engage in equitable and inclusive research programs and methodologies?
- Value to students' education (undergraduate and graduate) and preparation for future study or careers:
  - Do current students and alumni report satisfaction with their degrees?
  - Do alumni find jobs in their fields?
  - Do students graduate on time?
- Strengths and challenges across all administrative and student services within the Faculty:
  - Are available resources (central or Faculty-level) adequate to support students?
- Role within UBC and effectiveness in fulfilling that role:
  - How does the unit incorporate Indigenous and global perspectives into their curriculum? Research? Leadership?
  - How does the Faculty contribute to UBC Strategic Priorities 2025-2030?
  - How does the Faculty contribute to the UBC Okanagan Academic Priorities?
- Future objectives and resources or change necessary to achieve them:
  - Does the Faculty have adequate access to resources to meet their goals?
  - Does the Faculty's goals align with University strategic plans, including ISP and StEAR?

These questions are provided as a guide and Faculties are encouraged to modify to align with their own contexts, goals and strategic priorities
Please reach out to the Senior Manager, Academic Programs and Quality Assurance with any questions

Appendix C: Email template to invite external reviewers

Dr. XXXXX
[Address]
Email: [address]

Re: Invitation to serve as member of external review team

Dear Dr. XXXX:

I am pleased to invite you to serve as an external reviewer for the upcoming review of the Department of XXXXX in the Faculty of XXXXX, scheduled to take place between XXXXX and XXXXX.

External reviews are essential to shaping the growth and development of our university. As an exemplary scholar and leader in this field, you have been highly recommended as a potential external reviewer, and we are confident that this process would benefit greatly from your guidance and insights.

The purposes of the external review include:

- Evaluate program quality and academic operations of the unit highlight the strengths and challenges of educational and research programs of the unit;
- Advise on the unit's future development.

As part of the review, a Self-Study report will be provided to reviewers four weeks in advance of the site visit, followed by a two-day site visit to UBC's Okanagan campus. During the site visit, reviewers will meet with faculty, staff, students, senior UBC administrators and other groups and individuals as relevant. External reviewers will be expected to submit a final report of their findings within four weeks of the site visit.

External reviewers will receive an honorarium of CAD $1,200.00 upon completion of the final report. We will make necessary arrangements for travel and accommodation, and reviewers will be reimbursed for other travel expenses related to the review.

We sincerely appreciate your consideration, and welcome your valuable input to support UBC's Okanagan mission of academic excellence. I would be pleased to provide additional information and answer questions you may have. We look forward to hearing from you.

Sincerely,

[Dean's Name] [Title, Faculty]

Appendix D: Example of a curriculum map

Find an example below of a curriculum map developed using UBC's Curriculum MAP website.

Table Legend			
Colour	**Mapping Scale**	**Abbreviation**	**Description**
Light Blue	Introduced	I	Key ideas, concepts or skills related to the learning outcome are demonstrated at an introductory level. Learning activities focus on basic knowledge, skills, and/or competencies and entry-level complexity.
Medium Blue	Developing	D	Learning outcome is reinforced with feedback; students demonstrate the outcome at an increasing level of proficiency. Learning activities concentrate on enhancing and strengthening existing knowledge and skills as well as expanding complexity.
Dark Blue	Advanced	A	Students demonstrate the learning outcomes with a high level of independence, expertise and sophistication expected upon graduation. Learning activities focus on and integrate the use of content or skills in multiple settings.

Program Learning Outcomes Example	Communication and rhetorical literacies	Rhetorical modes and multimodality	Composition and writing conventions	Communication concepts	History and theories of rhetoric	Interdisciplinary	Indigenous ways of knowing and learning	Research methods	Collaborative	Professional Context
CORH 203	D	D	D	D	I	D	D	D	D	D
CORH 204	D	I	D	I	N/A	I	N/A	I	I	I
CORH 205	D	I	A	D	N/A	D	N/A	N/A	I	I
CORH 206	A	A	D	D	D	D	A	D	D	D
CORH 210	D	I	I	D	I	I	N/A	I	I	D
CORH 216	D	D	A	D	N/A	D	N/A	N/A	N/A	N/A
CORH 304	A	A	A	A	D	A	D	A	A	D
CORH 321	D	D	A	D	D	D	D	A	A	D
CORH 331	A	D	A	D	N/A	D	N/A	N/A	D	D
CORH 400	A / D	A	D / A	D	N/A	D	N/A	N/A	N/A	N/A
CORH 405	A	A	A	A	N/A	D	N/A	D / N/A / A	N/A / D	D
CORH 499	A	D	D	D	N/A	D	N/A	D / N/A	D	A

Appendix E: Sample site visit schedule

Ex. 1 - Academic Unit Level Review

DAY 1		In Attendance	Location
8:00	Pick up from hotel		
8:30 – 9:45	Tour of facilities (classroom, lab, research, and office spaces)		
10:00 – 10:45	Meeting with Dept Head/Director		
11:00 – 11:45	Meeting with the Dean and Associate Deans		
12:00 – 12:45	Lunch with students	Undergraduate students	
13:00 – 13:45	Meeting with the Provost and VP Academic and Associate Provosts		
14:00 – 14:45	Meeting with faculty (including professors, lecturers, sessional instructors, postdoctoral fellows, etc.)		
15:00 – 16:00	Drop-in meetings with staff/faculty and/or time to compile notes from the day		
DAY 2			
8:00	Pick up from hotel		
8:30 – 9:45	Meeting with key administrative and support staff in the unit (M&P staff, Student Academic Services, Admissions, Awards, Student Affairs, Finance, Development, Co-op, IT, etc.)		
10:00 – 10:45	Additional Unit leadership (Associate Director, Assistant Director, Program Coordinators or Directors)		
11:00-11:45	Time for a break or to compile notes		
12:00 – 12:45	Lunch with students	Graduate students	
13:00 – 15:00	Drop-in meetings with staff/faculty and/or time to compile notes from the day		
15:00	Drop off at hotel or airport		

Ex. 2 - Faculty Level Review

DAY 1		In Attendance	Location
8:00	Pick up from hotel		
8:30 – 9:45	Tour of facilities (classroom, lab, research, and office spaces)		
10:00 – 10:45	Meeting with Dean and Associate Deans		
11:00 – 11:45	Meeting with the Provost and Vice-President Academic and Associate Provosts		
12:00 – 12:45	Lunch with students	Undergraduate students	
13:00 – 13:45	Meeting with Deputy Vice-Chancellor and Principal; VP, Research and Innovation; AVP Finance and Operations; AVP Students, AVP University Relations; Senior Advisor to the DVC on Indigenous Affairs; and Executive Director, Development and Alumni Engagement		
14:00 – 14:45	Meeting with faculty (including professors, lecturers, sessional instructors, postdoctoral fellows, etc.)		
15:00 – 16:00	Drop-in meetings with staff/faculty and/or time to compile notes from the day		
DAY 2			
8:00	Pick up from hotel		
8:30 – 9:45	Meeting with key administrative and support staff in the unit (M&P staff, Student Academic Services, Admissions, Awards, Student Affairs, Finance, Development, Co-op, IT, etc.)		
10:00 – 10:45	Meeting with Additional Unit leadership (Associate Director, Assistant Director, Program Coordinators or Directors)		
11:00-11:45	Time for a break or to compile notes		
12:00 – 12:45	Lunch with students	Graduate students	
13:00 – 15:00	Drop-in meetings with staff/faculty and/or time to compile notes from the day		
15:00	Drop off at hotel or airport		

Appendix F: Site visit checklist

Status	Lead	Prior to site visit
		Identify dates that work for all reviewers and executive team (Dean, Associate Dean(s), Head/Director, Provost/Associate Provost)
		Secure meeting times for the review team and executive team
		Choose a person responsible for accessibility for the site visit using the UBC Planning Accessible Events guide.
		Choose contact person for the review team when on site. This person should be available and on campus during the site visit and willing to provide their cellphone number to reviewers should they need support during the day.
		Book flights and accommodations for review team. Consider: • Unit member who is picking up and dropping off reviewers every day. Choose hotel location accordingly (e.g., Four Points by the airport vs. hotel downtown) • Booking flights and hotel for the reviewers may save time processing reimbursements
		Book rooms on campus that are comfortable and conducive for dialogue. Consider: • Natural lighting • Sitting arrangement • Clock in the room • Space for catering • Room privacy
		Finalize site visit schedule ensuring time is set aside for all participants. Student engagement can be difficult;we encourage offering a catered lunch for student groups and external reviewers. Be sure to let them know food will be served, gather RSVPs for catering, and to send reminders the day before.
		Schedule an introductory and concluding meeting/dinner with the unit's executive team.
		Share the finalized schedule with all relevant partners and interestholders including the Office of the Provost
		Make the necessary arrangements for catering on campus and dinner reservations off campus as needed
Status	**Lead**	**During the site visit**
		Request at least one reviewer's cellphone number as point of contact during the site visit

		Agree on pick up/drop off times and locations
		Remind reviewers to keep all receipts for reimbursements
		Give the reviewers a hard copy of the schedule and help them stay on track by giving them 5-minute warnings
		Plan to walk with them when location changes are scheduled to ensure they are in the right place at the right time
		Collect all receipts from reviewers after the visit to process reimbursements as appropriate
		Ensure privacy for reviewers and unit members throughout the visit (i.e., Members of the leadership team of the unit under review should not be present during the scheduled conversations with faculty members)
Status	**Lead**	**After the site visit**
		Email reviewers to thank them
		Process any receipts collected from the site visit
		Upon reception of the reviewers' report, process honorarium. Call reviewers directly to gather their personal information as required by the finance department

Appendix G: Response and action plan template

External Review Committee members and site visit dates:

Date when the unit's response and action plan was submitted to the Provost's Office, Office of the Senate, and if the unit offers a graduate program, the College of Graduate Studies' Dean:

Overview

- Who was consulted and engaged in writing this action plan?
- How will the unit use this action plan for future planning and decision making?

Linkages to the unit and institutional strategic plans

Specify linkages between the results of the review to your unit's strategic plan, the broader faculty plan, and UBC's strategic plan(s) as relevant.

Note: Well-defined action items with clear timelines and responsibilities will help support the unit in completing the two-year progress report.

Recommendations Identified by the External Review Committee		
Recommendation	**Response/Action**	**Timeline/Responsibility**
Example from the audit of UBC Okanagan in 2021: The university should embed a requirement in the review process for clear articulation of the linkage of the review outcomes with unit and university strategic plans.	Example from the audit of UBC Okanagan in 2021: • Revise program review policy to explicitly include this expectation. • Develop resources to support academic units to achieve this goal.	Example from the audit of UBC Okanagan in 2021: Senate; Provost Office (with support from CTL) Policy review – November 2022 Resource Development – June 2023

Glossary of Acronyms [if relevant]

Appendix H: Progress report template

Two years after submission of the response report, action plan and summary) External Review Committee members and date of the site visit:

Date of submission of the response report, action plan and summary:

Summary of major accomplishments, changes to original action plan and challenges since submission of the unit's response:

Recommendations Identified by the External Review Committee			
Recommendation	**Response/Action**	**Timeline/ Responsibility**	**Progress update**
Example from the audit of UBC Okanagan in 2021: The university should embed a requirement in the review process for clear articulation of the linkage of the review outcomes with unit and university strategic plans.	Example from the audit of UBC Okanagan in 2021: • Revise program review policy to explicitly include this expectation. • Develop resources to support academic units to achieve this goal.	Example from the audit of UBC Okanagan in 2021: Senate; Provost Office (with support from CTL) Policy review – November 2022 Resource Development – June 2023	E.g., The program review policy has been revised and changes have been made based on campus- wide consultations to emphasize this expectation.