



Our Ref. 95963

OCT 28 2013

Dear Presidents:

As you know, the Minister of Advanced Education's Mandate letter includes "the requirement for post-secondary boards to undertake institution-wide core review of their programming to ensure student seats are being filled".

The Minister will be sending your Board Chairs the terms of reference for moving forward on this accountability by October 31, 2013. Prior to that, I wanted to ensure you had an opportunity to review the draft (copy attached).

The terms of reference are intended to provide high level guidance, and are not intended to be prescriptive in terms of process and approach. My goal is to balance the objectives of core review with existing institutional review processes, and provide some flexibility given differing institutional missions, mandates and legislation. The core review process provides an opportunity to showcase action your institution has already taken or is currently taking to manage costs and review/realign programs, as well as to demonstrate plans on a go-forward basis.

I know that the core review timelines are tight and, for some, may not completely align with your existing program review and budget processes. We will work closely with you and your staff to achieve the objectives of core review, including providing support and guidance, reporting templates, information/data sources, and other materials to help facilitate the process. To this end, I have appointed Susan Brown to be the Ministry's Executive Lead for core review.

I appreciate that the core review terms of reference include some additional reporting requirements related to process and outcomes. I have heard from many of you the issues and concerns you have regarding the extent of existing Ministry/Government reporting requirements. I want you to know that I am committed to reviewing existing reporting requirements and working with you to identify opportunities to streamline.

Let me know by end of day Monday, November 4 if you have any major issues or concerns with the draft and I will attempt to address those before the Minister formally sends the final

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document to Board Chairs. Feel free to contact me or Susan (phone: 250-387-6193; email: [Susan.B.Brown@gov.bc.ca](mailto:Susan.B.Brown@gov.bc.ca)) if you have any questions or would like to discuss.

Sincerely,

A handwritten signature in black ink, appearing to read 'Sandra', written in a cursive style.

Sandra Carroll  
Deputy Minister

pc: Mr. Blair Littler, Acting President  
Research Universities Council of British Columbia

Ms. Ruth Wittenberg, President  
British Columbia Association of Institutes and Universities

Mr. Jim Reed, President  
British Columbia Colleges

Ms. Susan Brown, Executive Director  
Ministry of Advanced Education



Our Ref: 96071

November 15, 2013

Dear Board Chairs:

As you are aware, government committed to evaluate all government programs and services including the requirement for post-secondary boards to undertake an institution-wide core review of their programming to ensure student seats are being filled.

A draft of the terms of reference was provided to your Presidents and the document attached reflects the feedback they provided.

The terms of reference are intended to provide high level guidance, and are not intended to be prescriptive in terms of process and approach. My goal is to balance the objectives of core review with existing institutional review processes, and provide some flexibility given differing institutional missions, mandates and legislation. The core review process provides an opportunity to showcase action your institution has already taken or is currently taking to manage costs and review/realign programs, as well as to demonstrate plans on a go-forward basis.

The overarching goal of the Core Review process is to ensure the best possible use of government resources and respect for the interests of taxpayers.

I appreciate your support in moving forward on this important accountability.

Sincerely,

Amrik Virk  
Minister

Attachment

pc: Presidents  
BC Public Post-Secondary Institutions

Sandra Carroll  
Deputy Minister

## **Terms of Reference**

### **Post-Secondary Institution Core Review of Programming**

#### **Introduction**

In the Minister of Advanced Education's Mandate Letter, there is a specific accountability to "include the requirement for post-secondary Boards to undertake an institution-wide core review of their programming to ensure student seats are being filled".

The Minister's Mandate Letter also includes specific accountabilities requiring institutions to meet budget targets and use resources as efficiently as possible, set targets to match the skills we need with the skills we are graduating, and continue to minimize overheads and consolidate functions across institutions. It is expected that these requirements will inform and/or align with the institutional core review.

These terms of reference set out the guidelines for moving forward on institutional core review and for reporting back on outcomes of the review(s). Public post-secondary Boards, in consultation with institutional administration and the Ministry, and respecting the role of Senates, Education Councils, and institutions' governing legislation, will be responsible for determining the process and approach for undertaking their institution's core review, in accordance with their institution's mandate.

The Ministry will be available to provide institutions with advice and guidance throughout the core review process, and will provide templates for report submissions.

#### **Scope**

The institutional core review is expected to encompass the full range of post-secondary programs – academic, technical, vocational/trades and developmental – as applicable to the institution, with a view to ensuring seats are being filled. In carrying this out, it is also important to consider the institution as a whole to ensure the institution is meeting its mission and mandate, and is leveraging available funding in the most effective and efficient way.

The institutional core review is not expected to:

- Replace the Administrative Service Delivery Transformation initiative, which is a separate and ongoing project;
- Encompass K-12 programming and/or alignment, although it is expected that this could be an opportunity for future dialogue; or
- Result in changes to the Government Reporting Entity.

#### **Objectives**

The objectives of the institutional Core Review are to:

- In addition to its legislative mandate, ensure that the programs offered by institutions contribute to students' career success and to achieving government's vision of a strong economy and secure tomorrow;
- Ensure that institutions are operating programs as efficiently and effectively as possible to ensure student seats are being filled;

- Consider opportunities for realignment or reallocation of programs. *Note: this should include action that has already been taken, action currently underway, and opportunities planned over the short, medium and long term. Actual and expected outcomes should also be included;*
- Consider opportunities to collaborate with other public post-secondary institutions to minimize program overlap and duplication and improve outcomes for students and the public;
- Continue to minimize overheads and consolidate functions across institutions outside of the Administrative Service Delivery Transformation initiative;
- Ensure budget targets are achieved consistent with Budget 2013 (June Update).

## Timing

The following sets out the timelines for the institutional core review process:

- By mid November – Terms of reference to be provided to institutional Board chairs
- By mid November – Institution to identify institutional core review lead and provide contact to Ministry
- By November/December 2013 – Institution to provide report to the Minister of Advanced Education outlining process and approach for institutional core review and any early outcomes
- November/December 2013 – Spring 2014 – Institutional core reviews underway
- By February 2014 – Institution to provide interim progress report to Minister of Advanced Education
- By Spring 2014 – Institutional core review process complete; Institution to provide report and recommendations to Minister of Advanced Education on plan for action.
- Spring 2014 – December 2014 – Implementation of institutional core review action plan
- December 31, 2014 – Implementation of institutional core review complete



a place of mind  
THE UNIVERSITY OF BRITISH COLUMBIA

OFFICE OF THE PRESIDENT

DEPUTY MINISTER'S OFFICE MINISTRY OF ADVANCED EDUCATION	
REF ID: A	7th Floor, Walter C. Koerner Library 1958 Main Mall Vancouver, BC Canada V6T 1Z2 Phone 604 822 8300 Fax 604 822 5055 Professor Stephen J. Toope President and Vice-Chancellor
REF TO: <input type="checkbox"/> DRAFT <input type="checkbox"/> Deputy Min <input type="checkbox"/> UBC's Interest <input type="checkbox"/> INFO / FILE <input type="checkbox"/> ADM <input type="checkbox"/> Executive Director	
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NOTES	

16 December 2013

Ms. Sandra Carroll  
Deputy Minister  
Ministry of Advanced Education  
PO BOX 9884 Stn Prov Govt  
Victoria, BC V8W 9T6

Dear Ms. Carroll:

I am writing in response to the Minister's letter to post-secondary institution Board Chairs earlier this fall regarding the provincial government's Core Review.

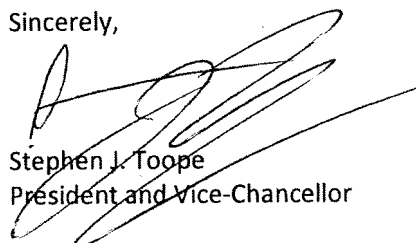
UBC appreciates that the Core Review is an opportunity to document actions the University has undertaken, initiatives currently underway as well as the University's planning for future efficiencies and responsiveness.

Successive provincial governments have played an integral role in UBC's progressive transformation into an internationally recognized university – an achievement that is benefitting British Columbians throughout our province. As a publicly funded institution, the University remains committed to ensuring the best use of government resources while respecting the interests and needs of British Columbians.

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I look forward to engaging with you further on Core Review over the coming months.

Sincerely,

  
Stephen J. Toope  
President and Vice-Chancellor

Encl.

- c. Pascal Spothelfer, Vice President, Communications and Community Partnership
- David Farrar, Provost and Vice President Academic
- Deborah Buszard, Deputy Vice Chancellor and Principal of the Okanagan campus
- John Hepburn, Vice President Research and International
- Pierre Ouillet, Vice President Finance, Resources and Operation

Pages 7 through 8 redacted for the following reasons:

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## West, Niya AVED:EX

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**From:** Wyllie, Sandra AVED:EX  
**Sent:** Friday, February 28, 2014 10:16 AM  
**To:** West, Niya AVED:EX; Brown, Susan B AVED:EX  
**Subject:** FW: PSI CR Guidelines  
**Attachments:** ToR-PSI review.pdf; Template - draft final.docx

Fyi

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**From:** Poirier, Dorice AVED:EX **On Behalf Of** Avison, Claire AVED:EX  
**Sent:** Wednesday, February 5, 2014 4:04 PM  
**To:** 'jimreed@bccolleges.ca'; 'Ruth.Wittenberg@ufv.ca'; 'Robin Ciceri'  
**Cc:** Wyllie, Sandra AVED:EX; Poirier, Dorice AVED:EX  
**Subject:** PSI CR Guidelines

Hi,

As follow up to the terms of reference for the institution-wide core review distributed in November and further to my note in early January, I am attaching guidelines to assist institutions in preparing interim progress reports, due to Minister at the end of February. I apologize for the delay in getting these out to you, and know that institutions are already well underway with preparing these reports.

Please note, we are not providing a specific template for reports. Institutions should approach development of interim reports in a way that reflects their mandate and specific context. The guidelines simply offer some points for consideration, but are not meant to be prescriptive or exhaustive.

There will be opportunities for Presidents to discuss potential proposed options/recommendations. The Deputy Minister and/or Assistant Deputy Minister(s) will follow up with Presidents directly prior to submission of final reports.

To provide additional clarity with respect to final reports due in Spring 2014, work is beginning with the Minister's office to schedule meetings in late May/June with Board Chairs for presentation of final reports. Meetings will likely be 30 minutes in length, and institutions will have the option of in-person or video-conference.

Please distribute these guidelines to your institutions, and feel free to contact me or Susan Brown if you have any questions or would like to discuss. Thanks.

**Claire Avison** | Assistant Deputy Minister, Sector Strategy and Quality Assurance | Ministry of Advanced Education | Cell: <sup>s.17</sup> | [claire.avison@gov.bc.ca](mailto:claire.avison@gov.bc.ca)



# Post-Secondary Institution Core Review of Programming - Interim Report Guidelines

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*The Minister of Advanced Education's mandate letter includes "the requirement for post-secondary Boards to undertake institution-wide core review of their programming to ensure student seats are being filled". Terms of Reference (copy attached) set out the guidelines for moving forward on institutional core review and for reporting back on outcomes.*

*As per the terms of reference, institutions are to provide interim progress reports, due the end of February. There is no specific template for interim progress reports; each institution should develop the report in a way that reflects its mandate, mission and context. Institutions may wish to consider the points below in scoping interim reports, but they are not intended to be a prescriptive list – some points may not be included or there may be other information that institutions may want to include. Reports should not exceed 10 pages.*

## **Points to Consider:**

- Major accomplishments over the last 2 to 3 years.
  - achievements related to the institution as a whole i.e., programs and services, governance, finance, business models etc.
  - alignment of programs to the labour market and strategic priorities (institution's and government's) to ensure program responsiveness, and where strategic investments have been made
  - key drivers for decisions about program mix e.g., student demand, student outcomes, employer/industry and regional considerations
- Additional opportunities for realignment of programs to ensure programs contribute to students' career success – actions underway or planned.
- Additional opportunities for realignment of programs to ensure programs are operating as efficiently and effectively as possible.
- Administrative efficiencies that have been achieved outside of the Administrative Service Delivery Transformation initiative.
- Recent collaborations/partnerships or innovations to program and service delivery or any new and emerging roles and responsibilities for the institution.
- Conditions for success
  - Challenges (internal or external)
  - Major policy areas that could be addressed or shifts that could facilitate programming, partnerships or institutional achievement of objectives.
- Options and/or preliminary recommendations (institutional or sectoral) being considered – short, medium or long term, expected outcomes.
  - Where government assistance (e.g., policy shifts/direction) may be required.

The Deputy Minister or one of the Assistant Deputy Ministers will follow up with the institution presidents directly to provide an opportunity for discussion of potential proposed options/recommendations prior to submission of final reports.