



**Board and Board Committee Meetings**  
**Monday May 26 and Tuesday May 27, 2025**

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University  
of Victoria

Open Session  
Tuesday May 27, 2025  
11:00 a.m. – 12:00 p.m.  
Via Videoconference

**DRAFT AGENDA**

- 1. Approval of Agenda**  
**MOTION:**  
*THAT the agenda of the open session of the regular meeting of May 27, 2025 be approved.*
- 2. Approval of Summary Record of the Meeting held April 1, 2025 (attached)**  
**MOTION:**  
*THAT the summary record of the open session of the regular meeting held April 1, 2025 be approved.*
- 3. Business Arising from the Summary Record**
- 4. Chair's Remarks**
- 5. Correspondence**
- 6. President's Report**
- 7. External Relations Update** BOG-May27/25-19

**CONSENT**

- 8. Finance Committee (Laylee Rohani)**
  - a. Collection and Remission of Student Fees for the University of Victoria Students' Society** BOG-May27/25-14  
**MOTION:**  
*THAT the Board of Governors collect and remit the fees as approved by the UVSS members and as outlined in the letter of April 30, 2025 from the Director of Finance and Operations of the UVSS, to the Associate Vice-President Student Affairs.*

## 9. Operations and Facilities Committee (Brian Cant)

### a. New and Revised Awards

BOG-May27/25-15

#### **MOTION:**

*THAT the Board of Governors approve new and revised undergraduate and graduate awards set out in the attached document and listed below:*

- Faculty of Law Travel and Professional Development Award (New)
- Faculty of Law Dean's Award (New)
- Ken Woods Vikes Women's Basketball Award\* (Revised)
- Mackenzie Rigg Men's Soccer Award\* (Revised)
- Bruce Wilson Vikes Men's Soccer Award\* (New)
- Academic Excellence Scholarship\* (Revised)
- William & Doreen Kerby Scholarship in Medieval British Literature\* (Revised)
- Edra Ferguson Graduate Scholarship\* (Revised)
- Women in Development Graduate Scholarship\* (Revised)
- Student International Activity Fund Award (Revised)
- Jane Zhu Cross-Cultural Integration Award (Revised)
- Abib Ngom and Natalie Chan Black Legal Scholar Award (New)
- Bennett Jones Entrance Award in Law (New)
- Budvitch Award in Holocaust Studies (Revised)
- Eleanor Gray Memorial Piano & Voice Duo Competition Prize (New)
- Fasken Entrance Scholarship (Revised)
- Fasken Indigenous Entrance Scholarship (Revised)
- Nelson Family Award\* (Revised)
- Vikes Men's Rugby Family Annual Award (New)
- mistermerv Award in Music Performance (New)
- Mary & David Norton Indigenous Leadership Fellowship\* (Revised)
- Anatolijus and Catherine Fouracre International Award\* (New)
- Women in Economics Graduate Scholarship\* (Revised)
- Certificate of Outstanding Academic Distinction\* (Revised)
- Faculty of Health Undergraduate Entrance Scholarship\* (Revised)
- Tolmie-Wood Scholarship\* (Revised)
- Jeanette Funke-Furber and Robert Furber Scholarship\* (Revised)
- Lii Michif Niiyanaan Award (New)
- Black Student Leadership Award (New)

*\* Administered by the University of Victoria Foundation*

**b. Proposal to establish a Bachelor of Engineering in Biomedical Engineering**

BOG-May27/25-24

**MOTION:**

*THAT the Board of Governors approve the proposal to establish a Bachelor of Engineering in Biomedical Engineering and Management, as described in the document “Bachelor of Engineering: Biomedical Engineering and Management”, and that this approval be withdrawn should the program not be offered within five years of the granting of approval. Once approved by Senate and the Board of Governors, the proposal must be approved by the Ministry of Post-Secondary Education and Future Skills.*

**c. Proposal to establish a non-credit certificate program in Data Analytics**

BOG-May27/25-25

**MOTION:**

*THAT the Board of Governors approve the proposal to establish a non-credit certificate program in Data Analytics, as described in the document “Certificate in Data Analytics (non-credit)”, and that this approval be withdrawn should the program not be offered within five years of the granting of approval.*

**d. Status Report on Capital Projects**

BOG-May27/25-16a

**e. Fighting against Forced Labour and Child Labour in Supply Chains Act (Bill S-211)**

BOG-May27/25-21

**MOTION:**

*THAT the Board of Governors approve the University of Victoria Forced Labour and Child Labour Statement for the Fiscal Year ended March 31st, 2025, for submission to the federal government.*

**Pro Forma Motion:**

*THAT the above items be approved by the Board of Governors by consent.*

**REGULAR**

**10. Audit Committee (Erinn Pinkerton)**

**a. 2024/25 Financial Statements**

BOG-May27/25-08

**MOTION:**

*THAT the Board of Governors approve the 2024/25 Audited Financial Statements and the appropriations as set out in the attached schedule;  
and  
THAT the Chair of the Board of Governors and the Vice-President Finance and Operations be authorized to sign the statements on behalf of the Board of Governors.*

**11. Executive and Governance Committee (Paul Ramsey)**

**a. Updates to Long Term Disability Trust Plan Document** BOG-May27/25-01

**MOTION:**

*THAT the Board of Governors approve the updated Plan Document for the Long Term Disability Plan for Faculty, Librarians and Professional Employees of the University of Victoria.*

**12. Other Business**

**Adjournment**





University  
of Victoria

## Board and Board Committee Meetings Monday March 31 and Tuesday April 1, 2025

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Open Session  
Tuesday April 1, 2025  
Senate and Board Chambers, Jamie Cassels Centre

### DRAFT SUMMARY RECORD

**Present:** Paul Ramsey (Chair), Samantha Allan, Erin Campbell, Brian Cant, Christina Clarke, Roshan Danesh, Marne Jensen, Val Napoleon, Erinn Pinkerton, Laylee Rohani, Jyoti Stephens, Ivan Watson, Carrie Andersen (Secretary)

**By Invitation:** Andrew Coward, Elizabeth Croft, Tony Eder, Chris Horbachewski, Lisa Kalynchuk, Kristi Simpson, Robina Thomas

**Regrets:** Marion Buller, Kevin Hall, Tamunobelema Itamunoala

**Call to Order:** The meeting was called to order at 11:00 a.m.

**1. Approval of Agenda**

**MOTION:** (P. Ramsey/I. Watson)

*THAT the agenda of the open session of the regular meeting of April 1, 2025 be approved.*

**CARRIED**

**2. Approval of Summary Record of the Meeting held January 28, 2025**

**MOTION:** (P. Ramsey/I. Watson)

*THAT the summary record of the open session of the regular meeting held January 28, 2025 be approved.*

**CARRIED**

**3. Business Arising from the Summary Record**

There was none.

**4. Chair's Remarks**

The Chair provided a territorial acknowledgement and spoke of the upcoming end of term for students.

**5. Correspondence**

There was none.

**6. President's Report**

In the absence of President Hall, there was no report.

- 7. External Relations Update** BOG-Apr01/25-26  
Chris Horbachewski, Vice-President External Relations highlighted the Distinguished Alumni Awards. Fifteen outstanding alumni are being recognized across three categories, the Presidents' Alumni Awards, the Indigenous Community Alumni Awards and the Emerging Alumni Awards.

In response to a question on the University Affairs article on CIFAL Victoria, C. Horbachewski provided some background on the UN-affiliated training centre.

## **CONSENT**

**8. Finance Committee (Laylee Rohani)**

- a. Graduate Students' Society Fees 2025/26** BOG-Apr01/25-06  
**MOTION:**

*THAT the Board of Governors collect and remit fees for the GSS in 2025/26 as outlined in the letter of February 25, 2025 from the Executive Director of the GSS to the UVic, Vice-President Finance and Operations, subject to confirmation of approval of the fees at the GSS Semi-Annual General Meeting on March 25, 2025.*

**9. Operations and Facilities Committee (Brian Cant)**

- a. New and Revised Awards** BOG-Apr01/25-07  
**MOTION:**

*THAT the Board of Governors approve new and revised undergraduate and graduate awards set out in the attachment and listed below:*

- Dennis, Jerome, and Peter Zachary Award in Ukrainian Studies\* (Revised)
- Emil and Lynette Hain Scholarship in Ukrainian Studies\* (Revised)
- Kari Moore Award (Revised)
- Langford-Seaborne Scholarship\* (Revised)
- Pearson Family Award\* (Revised)
- Peter Zachary Graduate Scholarship in Ukrainian Studies\* (Revised)
- Vikes Recreation Student Leadership Award\* (Revised)
- William & Amelia Kushniryk Memorial Award\* (Revised)
- All Our Relations Award\* (Revised)
- Birdwood Fund Award\* (Revised)
- CFUW Victoria Doreen Sutherland Indigenous Scholarship in the Faculty of Health\* (Revised)
- Cora Arenas and Carol Artemiw Women in Engineering and Computer Science Second Year Retention Award (Revised)
- Dr. Stephen Anthony Welch Art History Scholarship\* (Revised)
- Federation of Asian Canadian Lawyers Award (Revised)

- Harambee Refugee Award (New)
- Jane Zhu Entrepreneurship Scholarship (New)
- Joseph Arvay Social Justice Award (Revised)
- Joshua M. Prowse Prize in Refugee Law (New)
- Maclean Annual Award in Economics (Revised)
- Mairi Riddel Memorial Book Prize\* (Revised)
- Allan and Rosamund Russell Award in Civil Engineering (New)
- Doug Koch Memorial Scholarship (New)
- Law Class of 1994 Prize in Indigenous Field Study (New)
- Alexandra Pollock UVic Cheer Award (Revised)
- Denis & Pat Protti Award\* (Revised)
- Roberta Evelyn Milnes Scholarship\* (Revised)
- Ross & Stephanie Bailey Undergraduate Award\* (New)

*\* Administered by the University of Victoria Foundation*

**b. Proposal to establish a Business Minor in Entrepreneurship**

BOG-Apr01/25-08

**MOTION:**

*THAT the Board of Governors approve the proposal to establish a Business Minor in Entrepreneurship, as described in the document “Business Minor in Entrepreneurship”, and that this approval be withdrawn should the program not be offered within five years of the granting of approval.*

**c. Proposed changes to the Master in Management program**

BOG-Apr01/25-09

**MOTION:**

*THAT the Board of Governors approve the proposed changes to the Master in Management program, as described in the document “Master in Management”, effective January 2026.*

**d. Proposed changes to the Master of Business Administration in Sustainable Innovation program**

BOG-Apr01/25-10

**MOTION:**

*THAT the Board of Governors approve the proposed changes to the Master of Business Administration in Sustainable Innovation, as described in the document “MBA-BUSI – Sustainable Innovation Proposal”, effective September 2025.*

**e. Proposed changes to the Bachelor of Commerce program** BOG-Apr01/25-11

**MOTION:**

*THAT the Board of Governors approve the proposed changes to the Bachelor of Commerce program, as described in the document “Bachelor of Commerce – Gustavson School of Business”, effective September 2025.*

**f. Proposed changes to the Economics PhD program** BOG-Apr01/25-12

**MOTION:**

*THAT the Board of Governors approve the proposed changes to the Economics PhD program, as described in the document “Economics PhD Program Revisions”, effective September 2025.*

**g. Proposed changes to the Minor in Economics program** BOG-Apr01/25-13

**MOTION:**

*THAT the Board of Governors approve the proposed changes to the Minor in Economics program, as described in the document “Economics Minor”, effective September 2025.*

**h. Proposal to renew the Approved Centre Status for the Pacific Institute for Climate Solutions** BOG-Apr01/25-14

**MOTION:**

*THAT the Board of Governors approve the proposal to renew the Approved Centre Status for the Pacific Institute for Climate Solutions (PICS) for the period April 1, 2025 – March 31, 2030, as described in the memorandum dated January 22, 2025.*

**i. Proposal for the Social Justice Studies program to be jointly offered by the Department of Sociology and the Division of Continuing Studies** BOG-Apr01/25-15

**MOTION:**

*THAT the Board of Governors approve the proposal for the Social Justice Studies program to be jointly offered by the Department of Sociology and the Division of Continuing Studies, as described in the memorandum dated January 22, 2025.*

**j. Proposal for the Global Development Studies program to be jointly offered by the Department of Geography, the Department of Political Science and the Division of Continuing Studies** BOG-Apr01/25-16

**MOTION:**

*THAT the Board of Governors approve the proposal for the Global Development Studies program to be jointly offered by the Department of Geography, the Department of Political Science and the Division of Continuing Studies, as described in the memorandum dated January 22, 2025.*

**k. Status Report on Capital Projects**

BOG-Apr01/25-19a

**Pro Forma Motion:** (V. Napoleon/I. Watson)

*THAT the above items be approved by the Board of Governors by consent.*

**CARRIED**

**REGULAR**

**10. Finance Committee (Laylee Rohani)**

**a. Planning and Budget Framework 2026-2028**

BOG-Apr01/25-01

L. Rohani noted the planning and budget framework 2026-2028 item was presented to the Finance Committee on March 31. She introduced Andrew Coward, Associate Vice-President Financial Planning and Operations and Tony Eder, Associate Vice-President Academic Resource Planning who provided a presentation on the proposed budget framework for 2026-2028.

In response to a question about how increases in tuition lines up with other institutions, T. Eder indicated that comparison work is currently being updated and will be provided to the Board when complete. It was noted that UVic is likely in the middle or slightly lower range compared to others.

In response to a question on contingency funds, A. Coward explained the process for allocating contingency funds, should this become possible.

**MOTION:** (B. Cant/M. Jensen)

*THAT the Board of Governors approve the Planning and Budget Framework 2026–2028, including the tuition and other fee increases contained therein, and authorize the President to develop and implement the detailed operating budget for the 2025/26 fiscal year.*

**CARRIED**

## **11. Operations and Facilities Committee (Brian Cant)**

### **a. Enrolment Projections 2025/26**

BOG-Apr01/25-29

B. Cant stated that the enrolment projections for 2025/26 were received by the Operations and Facilities Committee meeting on March 31. UVic's total enrolment level is higher than what is funded by the province and the province does not provide funding for international undergraduate students.

#### **MOTION:** (B. Cant/V. Napoleon)

*THAT the Board of Governors approve a recommended enrolment level of 19,879 FTE for the 2025/26 academic year, subject to revisions in the event of new information regarding mandated growth, funding levels, application rates and world events.*

**CARRIED**

### **b. Capital Plan Guidelines and Emerging Priorities**

BOG-Apr01/25-21

B. Cant gave a brief update on the work being done to revise the five-year capital plan. Priorities to align with the mandate of the government and the needs of the university have been identified. The draft capital plan will come to the Board of Governors for approval before submission in the summer.

### **c. Capital Projects Policy**

BOG-Apr01/25-17

B. Cant noted that the policy was last updated in 1998 and that the draft policy and updates to the Terms of Reference, based on discussions at the meeting, would be brought to the Board of Governors for approval at the May 2025 meeting.

### **d. Interim Appointment Procedures for Associate Dean of Health**

BOG-Apr01/25-24

B. Cant outlined the rationale for the revisions. The inaugural Dean of Health will develop new appointment procedures and bring a revised policy to Senate and the Board of Governors for approval by March 2026.

#### **MOTION:** (B. Cant/L. Rohani)

*THAT the Board of Governors approve revisions to policy GV0640, Procedures for the Appointment of the Associate Dean Human and Social Development with a mandated review date of March 2026, and that the title of the policy be updated to Interim Procedures for the Appointment of the Associate Dean of Health.*

**CARRIED**

**12. Other Business**

**a) Proposed Revisions to the Procedures for the Appointment of the Vice-President Indigenous**

P. Ramsey reported on revisions to the appointment procedures that had been approved by the Board electronically.

There being no other business, the meeting adjourned at 11:36 a.m.



University  
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BOG-May27/25-19

## SUBMISSION TO THE UVIC BOARD OF GOVERNORS

**Date:** May 12, 2025

**To:** Board of Governors

**For:** Information

**From:** Chris Horbachewski, Vice President, External Relations

**cc:** President and Vice-Chancellor

**Meeting Date:** May 27, 2025

**Subject:** External Relations Update MAY OPEN

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### Background:

The following Open Session report provides an update on our activities in:

- Communicating the UVic mission and story
- Celebrating success and excellence
- Building meaningful partnerships

### COMMUNICATING THE UVIC MISSION AND STORY

UVic announced the reappointment of President and Vice-Chancellor Kevin Hall for a second five-year term on April 24th. This was shared via broadcast email to staff and faculty, posted on [uvic.ca](https://uvic.ca) and shared via social media, including LinkedIn.

### CELEBRATING SUCCESS AND EXCELLENCE

#### UVic shares Breakthrough Prize in physics

Scientists from the University of Victoria are among global researchers honoured with the 2025 Breakthrough Prize in Fundamental Physics for their work with the ATLAS Collaboration at CERN, an intergovernmental organization that operates the largest particle physics laboratory in the world—the Large Hadron Collider (LHC). UCAM worked with the research office and science faculty to story tell about the prize, commonly dubbed the



“Oscars of science” with a Hollywood red carpet, sharing with thousands of researchers from 70 countries. [Read the story](#)

### **\$24M boost to advance ocean-based carbon dioxide removal**



Solid Carbon: The Ocean’s Rock-solid Sociotechnical Climate Solution—one of the most promising ocean-based carbon dioxide removal (CDR) initiatives of the modern era to combat the climate crisis—was among six initiatives [awarded funding under the NFRF’s Transformation stream](#)

The Government of Canada made a \$24-million announcement to support the large-scale Canadian-led interdisciplinary research. [Read the story](#)

### **Faculty of Health**

The new Faculty of Health website is now live at: [www.uvic.ca/health](http://www.uvic.ca/health)

### **Distinguished Alumni Awards**

- Announced **15** new [Distinguished Alumni Award](#) recipients – a diverse group of remarkable UVic alumni – making an impact both locally and internationally. **41** nominations were received from UVic staff, faculty, alumni, and community members.
- With with the Office of the Vice President Indigenous and Office of Indigenous Academic and Community Engagement, a blanketing ceremony for the Indigenous award recipients was introduced this year.
- Additionally, with language knowledge keepers Alumni Engagement added a SENĆOTEN and Ləkʷəŋən word to the “Distinguished Alumni Awards” name. We are honoured to have worked with Dr. Elmer George from Songhees First Nation who bestowed the Ləkʷəŋən words and Dr. John Elliot from Tsartlip First Nation, who played a significant role in developing the SENĆOTEN word.

łíłəl ʔa kʷs ʔkʷəxnəq Skʷukʷəlstəŋəʔ are the Ləkʷəŋən words that translate to, gift for the successful student, alum, and these words acknowledge the SENĆOTEN word SIÁMĆEŁ

which translates to, award recipients are highly respected alums who continue to do respectful work.

### **Spring 2025 Convocation [June 9 – 13]**

- There will be eleven (11) ceremonies, to accommodate the 4,039 eligible UVic graduands. There will be five honorary degrees conferred during Spring 2025 Convocation.

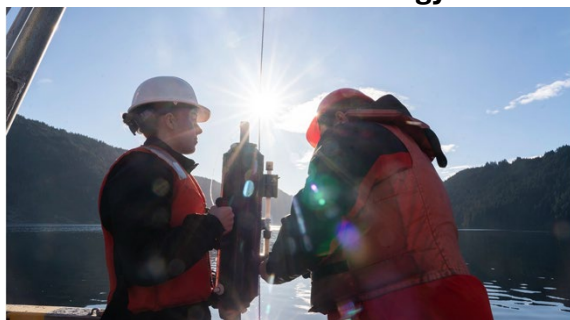
## **BUILDING MEANINGFUL PARTNERSHIPS**

### **Relationship Protocol advances First Nations climate solutions**



UCAM worked closely with our research unit partner to generate media highlighting the First Nations Leadership Council (FNLC) and the Pacific Institute for Climate Solutions (PICS) entering a Relationship Protocol. The [Relationship Protocol between First Nations Leadership Council and the Pacific Institute for Climate Solutions](#) establishes a collaborative, constructive, and voluntary working relationship and is designed to uphold First Nations title, rights, and treaty rights while advancing climate action across British Columbia. The protocol was featured in [Academica](#). [Read the story](#)

### **Three decades of clean energy innovation under one roof**



Developed at UVic, a new provincial centre will energize BC's coastal communities, businesses and industries with cutting-edge marine renewable energy and decarbonization technologies. UCAM supported storytelling and while amplifying to media, the BC Marine Energy & Decarbonization Hub—a partnership between UVic and the Centre for Ocean Applied Sustainable Technologies (COAST). [Read more](#)

### **Student Awards and Financial Aid website gets an overhaul**

In collaboration with SAFA and University Systems, UCAM completed the final phase of the [Student Awards and Financial Assistance website](#) redesign, pushing the project live on April 17. This marks the completion of a multi-part web communications project that dramatically improved the functionality and user experience for prospective students who are looking for student aid information from scholarships and bursaries through work study positions.



University  
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BOG-May25/25-14

## SUBMISSION TO THE UVIC BOARD OF GOVERNORS

**Date:** May 13, 2025

**To:** Finance Committee

**For:** Decision

**From:** Kristi Simpson, Vice-President Finance & Operations

**cc:** President and Vice-Chancellor

**Meeting Date:** May 27, 2025

**Subject:** Collection and Remission of Student Fees for the University of Victoria  
Students' Society (UVSS)

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### Recommendation:

*THAT the Finance Committee recommend to the Board of Governors that the Board of Governors collect and remit the fees as approved by the UVSS members and as outlined in the letter of April 30, 2025 from the Director of Finance and Operations of the UVSS, to the Associate Vice-President Student Affairs.*

### Background:

The attached letter confirms fee details for the 2025 fall semester. There are four specific changes to individual UVSS fees from the outlined Fall and Winter terms last fiscal year, and there is an update to the extended enhanced Health and Dental plans starting in the Fall of 2025, as per the attached letter.

**Basis for Jurisdiction:** University Act 27.1

### Attachment(s):

Letter dated April 30, 2025 from Kushi Wadhwa, Director Finance and Operations, to Jim Dunsdon, Associate Vice-President Student Affairs.



30 April, 2025

Jim Dunsdon  
Associate Vice-President Student Affairs  
University of Victoria

Dear Jim Dunsdon,

I am authorized by the Bylaws of the University of Victoria Students' Society (UVSS) to send this notice to the University of Victoria with regard to the collection and remission of student fees in accordance with the University Act and to make the certifications and representations contained in this notice.

**This purpose of this letter is to officially confirm the UVSS Fees for the 2025 Fall Semester.** There are four specific changes to individual UVSS fees from the outlined Fall and Winter terms last fiscal and there is an update to the extended enhanced Health and Dental plans starting in the Fall of 2025. Any changes to previous letter are highlighted in yellow.

All membership fees are set through a referendum as required by the University Act and the UVSS Bylaws.

As set by a majority of the members of the UVSS who voted in previous referenda over the years, I certify that the **UVSS membership fees for the 2025 Fall semester are as follows:**

Fee	Amount
UVSS Fee Fall 2025	<del>\$86.55</del> for full-time students and <del>\$43.27</del> for part-time students each semester
Universal Bus Pass	\$81.00 per semester
Extended Health Plan	<del>\$208.37</del> <b>\$218.79</b> per year for students taking at least 3.0 on-campus credit in the fall semester and <del>\$138.94</del> <b>\$145.86</b> (2/3) for students taking at least 3.0 on-campus credits in the spring semester but not assessed <del>\$208.37</del> <b>\$218.79</b> in the fall semester
Dental Plan	<del>\$208.37</del> <b>\$218.79</b> per year for students taking at least 3.0 on-campus credits in the fall semester and <del>\$138.94</del> <b>\$145.86</b> (2/3) for students taking at least 3.0 on-campus credits in the spring semester not assessed <del>\$208.37</del> <b>\$218.79</b> in fall semester

**The basic plan for both dental or extended health is also changed** and will to be **\$145** **\$152.25** for students taking 3.0 on-campus credits in the fall and **\$96.67** **\$101.5** (2/3 cost of full) for basic coverage for students taking 3.0 on-campus credits in the spring semester and not assessed in the fall. The University will assess all students at the enhanced rate and the UVSS/Studentcare will facilitate an opt down to the basic rate or an opt out altogether for either or both the extended Health and Dental plans.

The fees for the Professional Development Unions have been assessed as the following:

<b>Fee</b>	<b>Amount</b>
Commerce Student Society	\$50.00 per semester for Commerce Students
Engineering and Computer Science Student Society	\$30.00 per semester for full-time Engineering students registered in on campus classes
Education Student Association	\$7.50 per semester for students registered in Education
Law Student Society	<b>\$170</b> <b>\$180</b> per semester for full-time Law students and \$90 per semester for part-time Law students.

All students, including co-op and distance students, in 3.0 credits or more are assessed Health and Dental Plan fees. Distance and co-op students are not automatically enrolled but may choose to opt-in to the U-Pass.

The credit requirement for the assessment of each fee remains the same as in the previous academic year.

I hereby certify that the UVSS has made available to its members annual audited financial statements.

The University Act and the Bylaws of the UVSS require that these fees will be applied to all undergraduate students including distance and co-op students.

We expect no changes to policies or practices in relation to fee collection, including the appearance of the fee statement, the method and timeliness of the collection and the penalties imposed on those students who fail to pay their fees, except as otherwise stated in this letter.

See Appendix 'A' for a specific breakdown of the University of Victoria Student's Society Fee.

Sincerely,

Khushi Wadhwa  
Director of Finance and Operations

Copy: Lori Hunter  
Director, Student Awards and Financial Aid

Tory Hastings  
Manager, Manager Tuition Fees

Rhonda Ljunggren  
Office of the Vice-President Finance and Operations

## Appendix “A”

Fee Type	2025 Fall Semester (Full-Time)	2025 Fall Semester (Part-Time)
Student Association Fee (Society Operations)	32.6	16.30
Canadian Fed. of Students Fee-BC	N/A	N/A
Student Newspaper Fee	3.75	1.875
Student Union Building Fee	4.25	2.125
Dr Ewing Memorial	4.25	2.125
Medical/Dental Fee	No Fees Assessed in Summer Semester	No Fees Assessed in Summer Semester
Misc. Fees (list each separately)		
- CFUV	5	2.5
- Clubs and Course Unions/Travel Pool	2.5	1.25
- Constituency Organisations	2	1
- Daniel Jacobs Bursary	0.5	0.25
- Day Care Assistance Fund	1	0.5
- Food Bank	2.25	1.12
- International Student Award	0.5	0.25
- Native Students' Union	2.5	1.25
- Disability Advocacy	3	1.5
- Ombudsperson	1.5	0.75
- Anti-Violence Project	4	2
- UVSP	1.30	0.65
- Gender Empowerment Centre	2.00	1.00
- WUSC	2.5	1.25
- Pride	2.00	1.00
- Community Gardens	4.50	2.25
- Events	0.5	0.25
- Elections	0.4	0.2
- Campaigns	0.5	0.25
- Students of Colour Collective	1.50	.75
- Peer Support Centre	1.00	.50
- Uni 101	.75	.37
	\$86.55	\$43.27





University  
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BOG-May27/25-15

## SUBMISSION TO THE UVIC BOARD OF GOVERNORS

**Date:** May 12, 2025

**To:** Operations and Facilities Committee

**For:** Decision

**From:** Elizabeth Croft, Vice-President Academic and Provost

**cc:** President and Vice-Chancellor

**Meeting Date:** May 27, 2025

**Subject:** New and Revised Awards

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### Recommendation:

*THAT the Operations and Facilities Committee recommend to the Board of Governors that the Board of Governors approve new and revised undergraduate and graduate awards set out in the attached document and listed below:*

- Faculty of Law Travel and Professional Development Award (New)
- Faculty of Law Dean's Award (New)
- Ken Woods Vikes Women's Basketball Award\* (Revised)
- Mackenzie Rigg Men's Soccer Award\* (Revised)
- Bruce Wilson Vikes Men's Soccer Award\* (New)
- Academic Excellence Scholarship\* (Revised)
- William & Doreen Kerby Scholarship in Medieval British Literature\* (Revised)
- Edra Ferguson Graduate Scholarship\* (Revised)
- Women in Development Graduate Scholarship\* (Revised)
- Student International Activity Fund Award (Revised)
- Jane Zhu Cross-Cultural Integration Award (Revised)
- Abib Ngom and Natalie Chan Black Legal Scholar Award (New)
- Bennett Jones Entrance Award in Law (New)
- Budvitch Award in Holocaust Studies (Revised)
- Eleanor Gray Memorial Piano & Voice Duo Competition Prize (New)
- Fasken Entrance Scholarship (Revised)
- Fasken Indigenous Entrance Scholarship (Revised)

- Nelson Family Award\* (Revised)
- Vikes Men's Rugby Family Annual Award (New)
- mistermerv Award in Music Performance (New)
- Mary & David Norton Indigenous Leadership Fellowship\* (Revised)
- Anatolijus and Catherine Fouracre International Award\* (New)
- Women in Economics Graduate Scholarship\* (Revised)
- Certificate of Outstanding Academic Distinction\* (Revised)
- Faculty of Health Undergraduate Entrance Scholarship\* (Revised)
- Tolmie-Wood Scholarship\* (Revised)
- Jeanette Funke-Furber and Robert Furber Scholarship\* (Revised)
- Lii Michif Niiyanaan Award (New)
- Black Student Leadership Award (New)

\* Administered by the University of Victoria Foundation

**Background:**

New and revised awards support the recruitment and retention of talented students, aligned with our Strategic Plan and enrolment goals. Awards, including competitive entrance scholarships and bursaries, enable the university to continue to attract, recruit and retain a diverse community of outstanding students.

**Previous Consultation:**

The Senate Committee on Awards reviewed the proposed awards and recommended their approval by Senate. At their April 4 and May 2, 2025 meetings, Senate approved the awards and recommended their approval by the Board of Governors.

**Planned Further Action:**

Student Awards and Financial Aid will administer the awards after approval.

**Basis for Jurisdiction:** University Act, 27 (2)(k)  
Strategic Plan  
Student Awards Policy AC1130

**Attachment(s):** Terms for New and Revised Awards

## **Appendix 1**

### **Scholarships, medals and prizes**

Scholarships, medals and prizes are awarded to students primarily on the basis of academic merit. Other additional eligibility criteria, as specified in the terms of reference, will be considered when selecting recipients. Scholarships, medals and prizes for undergraduate students are administered by Student Awards and Financial Aid (SAFA). Detailed information about the terms of reference and application process (if applicable) for undergraduate scholarships, medals and prizes is available on the SAFA [website](#).

### **Awards**

UVic also offers non-repayable funding referred to as awards. Recipients are selected on the basis of the eligibility criteria specified in the terms of reference for each award. Eligibility criterion may include, but are not limited to, a minimum academic achievement, financial need, identifying with a group with historical and/or current barriers to equity, program of study or participation in a varsity sport.

Recipients of athletic awards are selected on the basis of the eligibility criteria specified in the terms of reference for the award and the requirements stipulated by U SPORTS; an organization external to UVic that establishes the funding rules for student athletes in varsity sport at participating universities in Canada.

U SPORTS regulations state that student athletes receiving an athletic award in their entering year who have never participated in varsity sport at a post-secondary institution are not required to meet a minimum grade point average requirement.

Continuing student athletes must have passed a minimum of 9.0 units for credit with a minimum GPA of 3.0 in the preceding September to August terms of study. The total combined value of athletic awards cannot exceed the student's assessed tuition and mandatory fees for the terms in which they receive the funding.

### **Bursaries**

Bursaries are non-repayable financial assistance awarded on the basis of financial need and satisfactory academic standing. There may be additional selection criteria specified in the terms of reference, but financial need is the primary selection criteria.

Detailed information about the online bursary application process is available on the SAFA [website](#).

## Appendix 2

### Terms for New and Revised Awards

Additions are underlined

Deletions are ~~struck through~~

#### **Faculty of Law Travel and Professional Development Award (New)**

One or more awards are given to undergraduate students in the Faculty of Law to assist with travel or professional development. This award may be given to graduating students.

Approval of the recipients will be made by the Senate Committee on Awards upon the recommendation of the Faculty of Law.

#### **Faculty of Law Dean's Award (New)**

One or more awards are given to undergraduate students continuing in the Faculty of Law who have demonstrated academic ability together with determination, resilience, contribution and compassion in areas of life such as prior work experience, graduate study, community service, family care or disability.

Approval of the recipients will be made by the Senate Committee on Awards upon the recommendation of the Faculty of Law.

#### **Ken Woods Vikes Women's Basketball Award\* (Revised)**

One or more awards are ~~award is~~ given to ~~an~~ undergraduate or graduate ~~woman~~ students who competes on the Vikes Women's Basketball team. Eligible students must meet all U SPORTS eligibility requirements. Award recipients must:

- be an impact player (starting 5th or 6th woman)
- demonstrate leadership, work ethic and a commitment to improving on the court
- be committed to academic excellence, and
- be a positive role model in the community (on or off campus).

Award recipients will be ~~selected~~ nominated by the Director, Varsity Performance Sport Head Coach in consultation with the ~~Senior Director of Athletics and Recreation and the Director of Varsity Head Coach Performance Sport.~~ Approval of the recipients will be made by the Senate Committee on Awards upon the recommendation of the Department of Wellness, Recreation and Athletics.

#### **Mackenzie Rigg Men's Soccer Award\* (Revised)**

One or more awards are ~~The award is~~ given to ~~an~~ undergraduate or graduate students who participates in the Vikes Men's Soccer program at the University of Victoria. Eligible students must meet all U SPORTS eligibility requirements. The successful award recipients will be a student athletes who best ~~exemplifies~~ exemplify Mackenzie's greatest qualities including: a strong work ethic and commitment to both Vikes Soccer and to the greater Varsity community at UVic, the demonstration of a positive attitude, the natural ability to lead, and a dedication to a strong and supportive team culture. The award recipients will be ~~determined~~ nominated by the Director, Varsity Performance Sport in consultation with the Varsity Head Coach ~~in consultation with the Senior Director of Wellness, Recreation and Athletics and the Director, Varsity Performance Sport.~~ Approval of the recipients will be made by the Senate

Committee on Awards upon the recommendation of the Department of Wellness, Recreation and Athletics.

**Bruce Wilson Vikes Men's Soccer Award\* (New)**

One or more awards are given to undergraduate and graduate students who compete on the Vikes Men's Varsity Soccer team at the University of Victoria. Eligible students must meet all U SPORTS eligibility requirements. Award recipients will be nominated on the basis of work ethic, commitment and performance criteria by the Director, Varsity Performance Sport in consultation with the Varsity Head Coach. Approval of the recipients will be made by the Senate Committee on Awards upon the recommendation of the Department of Wellness, Recreation and Athletics.

**Academic Excellence Scholarships\* (Revised)**

One or more ~~Up to three one-time~~ scholarships of equal value will be awarded to academically outstanding undergraduate students in ~~entering~~ second year in the Faculty of Science and who are Canadian citizens.

**William & Doreen Kerby Scholarship in Medieval British Literature\***

A scholarship ~~of \$1,000~~ is awarded to an outstanding graduate student in the Department of English pursuing a graduate degree Ph.D. in Medieval British Literature. Approval of the recipient will be made by the Faculty of Graduate Studies Graduate Awards Committee upon the recommendation of the Department of English.

**Edra Ferguson Graduate Scholarship\* (Revised)**

One or more scholarships are awarded to academically outstanding graduate students entering or continuing in the LLM or PhD program in the Faculty of Law whose focus of study is directly or comparatively on Canadian-related Indigenous Law. Preference will be given to a student from Nunavut, Northwest Territories, or Yukon. Approval of the recipient will be made by the Faculty of Graduate Studies Graduate Awards Committee upon the recommendation of the Faculty of Law.

**Women in Development Graduate ~~Bursary~~ Scholarship\* (Revised)**

A One or more scholarships are ~~bursary~~ is awarded to a women female international graduate students at the University of Victoria. Preference is for students with financial need. Further pPreference is for ~~will be given to~~ students from Sub-Saharan Africa and South Asia. Approval of the recipient will be made by the Faculty of Graduate Studies Graduate Awards Committee upon the recommendation from departments.

**Student International Activity Fund Student Awards (Revised)**

~~40 Twenty~~ or more awards of ~~\$500~~ \$1,000 each are awarded to full-time undergraduate and graduate students who are going abroad on an unpaid international learning experience. These would include volunteer projects, exchange or study abroad programs, unpaid internships, practicum or co-op placement that are longer than two weeks. Students must submit a letter of support, a budget and a ~~2-3~~ 1 page statement of purpose ~~to the Office of International Affairs~~ outlining what they will be doing overseas as well as and their motivation for undertaking the activity. ~~Applications can be obtained from the Office of International Affairs and deadlines for submissions are: November 15th, March 15th and June 15th. In the event there are more applicants than awards, financial need will be considered to determine the award recipients.~~ are available online through the Office of Global Engagement website

and deadlines for submission are the third Wednesday of November, March and June.

**Jane Zhu ~~MBA~~ Cross-Cultural Integration Award (Revised)**

~~Two awards of \$1,000 are awarded to two students~~ One award of \$5,000 will be given to an international student and one award of \$5,000 will be given to a student who is a Canadian citizen or permanent resident of Canada who are in their final year of the MBA or the MGB program in the Sardul S. Gill Graduate School at the Peter B. Gustavson School of Business. The purpose of this award is to recognize students who encourage and promote cross-cultural awareness and understanding and bring together and help facilitate the integration and socialization of domestic and international students throughout the MBA or the MGB program. Students may self-nominate or be nominated by other students, faculty and staff ~~via a video entry. Entries must be accepted by~~ Nominations must be submitted to the Sardul S. Gill Graduate School by October 31st. Graduating students are eligible for this award. Selection Approval of the recipients will be made by the Faculty of Graduate Studies Graduate Awards Committee upon the recommendation of the ~~MBA Awards Committee Gill Graduate School, Peter B. Gustavson School of Business~~ Sardul S. Gill Graduate School, Peter B. Gustavson School of Business.

**Abib Ngom and Natalie Chan Black Legal Scholar Award (New)**

One award will be given to an undergraduate student continuing in the Faculty of Law who self-identifies as Black. ~~Preference~~ will be given to students with demonstrated academic ability together with determination, resilience, contribution and compassion in areas of life such as prior work experience, graduate study, community service, family care or disability. Approval of the recipient will be made by the Senate Committee on Awards upon the recommendation of the Faculty of Law.

**Bennett Jones Entrance Award in Law (New)**

One award of at least \$2,500 is given to an undergraduate student entering the Faculty of Law who demonstrates leadership, community involvement and/or academic excellence. Preference will be given to a student who demonstrates an interest in business law or commercial litigation. Approval of the recipient will be made by the Senate Committee on Awards upon the recommendation of the Faculty of Law.

**Budvitch Award in Holocaust Studies (Revised)**

Three One awards of \$1,800 each are is given to an undergraduate students to assist with the travel costs of the I-witness Field School (travel to, from and within Europe) who have has demonstrated financial need and who would otherwise not be able to attend the School. The student will be selected by the Director of the I-witness Field School.

Approval of the recipients will be made by the Senate Committee on Awards upon the recommendation of the Germanic and Slavic Studies program in the School of Languages, Linguistics and Cultures.

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**Eleanor Gray Memorial Piano & Voice Duo Competition Prize (New)**

A total of \$5,000 is awarded to undergraduate or graduate students in the School of Music studying piano or voice who competed in the *Art Song Competition for Piano/Voice Duos*. Prizes of \$1,500 each are awarded to the first place duo and prizes of \$1,000 each are awarded to the second place duo. Approval of the recipients will be made by the Senate Committee on Awards or the Faculty of Graduate Studies Graduate Awards Committee upon the recommendation of the School of Music.

**Fasken Entrance Scholarship (Revised)**

One Two scholarships of \$3,000 is \$2,000 each are awarded to an academically outstanding undergraduate students entering the JD program who has have demonstrated entrepreneurial initiative in the community and/or an interest in business through academic pursuits. Approval of the recipients will be made by the Senate Committee on Awards upon the recommendation of the Faculty of Law.

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**Fasken Indigenous Entrance Scholarship (Revised)**

A scholarship of ~~\$2,500~~ \$1,500 is awarded to a student entering the JD program who self-identifies as Indigenous and has demonstrated community involvement. Preference will be given to a student with high academic achievement. Approval of the recipient will be made by the Senate Committee on Awards upon the recommendation of the Faculty of Law.

**Nelson Family Award\***

One or more awards are given to entering or continuing undergraduate international students from sub-Saharan Africa with demonstrated financial need. Preference will be given to students in the Faculty of Health. ~~Human and Social Development.~~

**Vikes Men's Rugby Family Annual Award (New)**

One or more awards are given to undergraduate and graduate students who compete on the Vikes Men's Rugby team at the University of Victoria. Award recipients must meet all U SPORTS eligibility requirements and will be selected on the basis of work ethic, commitment and performance criteria by the Director, Varsity Performance Sport in consultation with the Varsity Head Coach. Approval of the recipients will be made by the Senate Committee on Awards upon the recommendation of the Department of Wellness, Recreation and Athletics.

**mistermerv Award in Music Performance (New)**

One or more awards, of at least \$2,000 each, are given to academically outstanding third or fourth year undergraduate students in music performance, with preference to students who have successfully completed MUS 345. Approval of the recipients will be made by the Senate Committee on Awards upon the recommendation of the School of Music.

**Mary & David Norton Indigenous Leadership Fellowship\* (Revised)**

One or more fellowships, of at least \$5,000 each, are awarded to First Nations, ~~Metis or Inuit~~ or Metis PhD students in the ~~Faculty of Human and Social Development~~ in the latter stages of thesis or dissertation preparation ~~whose studies are focused on improving the lives of Indigenous communities.~~ Students must submit an outline (maximum 250 words) describing how their research is focused on improving lives in Indigenous communities via the online graduate scholarship application between July 1st and September 15th. Students may receive this fellowship more than once. Approval of the recipient(s) will be made by the Faculty of Graduate Studies Graduate Awards Committee upon the recommendation of the ~~Faculty of Human and Social Development.~~ Office of Indigenous Academic and Community Engagement.

**Anatolijus and Catherine Fouracre International Award\* (New)**

One or more awards of at least \$1,000 each are given to fourth year undergraduate students enrolled in the Bachelor of Commerce program at the Peter B. Gustavson School of Business who will be taking part in an international exchange term at one of the business school's partner universities. Students must meet the Gustavson School of Business minimum requirements for International Exchange. Approval of the recipients will be made by the Senate Committee on Awards upon the recommendation of the Gustavson School of Business. Graduating students are eligible for this award.

**Women in Economics Graduate Scholarship\* (Revised)**

One or more scholarships of at least \$5,000 each are ~~scholarship is~~ awarded to an academically outstanding women graduate students entering in the first year of a ~~graduate~~



degree Master's program in the Department of Economics who are Canadian citizens ~~7 or~~ permanent residents. Preference is for students with demonstrated financial need. ~~Applications must be submitted by January 31 prior to September entry to the Economics Department and should reference community service and/or demonstrated leadership inside and outside of the classroom. Preference will be given to students who have indicated an intention or interest in the co-operative education program in the first year of their graduate study.~~ Approval of the recipients will be made by the Faculty of Graduate Studies Graduate Awards Committee upon the recommendation of the Department of Economics.

### **Certificate of Outstanding Academic Distinction ~~in Human and Social Development~~\* (Revised)**

A certificate of distinction and a prize of a minimum of \$1,000 is awarded to the four undergraduate students with the highest graduating grade point average in the ~~Faculty of Human and Social Development~~ registered for the BA, BCYC, BSc, BSN or BSW degree School of Public Health & Social Policy, the School of Nursing, the School of Social Work and the School of Health Information Science.

Approval of the recipient will be made by the Senate Committee on Awards upon the recommendation of the ~~Faculty of Human and Social Development~~ School of Public Health & Social Policy, the School of Nursing, the School of Social Work and the School of Health Information Science. The prizes are offered in recognition of the education and research impact of these four schools of the former Faculty of Human & Social Development.

### **Faculty of Health ~~Human & Social Development~~ Undergraduate Entrance Scholarship\* (Revised)**

One or more scholarships are awarded to academically outstanding undergraduate students entering the Faculty of Health. ~~Human and Social Development.~~

### **Tolmie-Wood Scholarship\* (Revised)**

One or more scholarships are awarded to academically outstanding undergraduate Indigenous students ~~in the Faculty of Human and Social Development.~~ At least one scholarship will be a minimum of \$1,000. Students must complete the online application which is available April 1 to May 31 each year and submit a letter (maximum 350 words) outlining their paid or volunteer contributions to their community. The contribution can include artistic and cultural work, and/or involvement with Indigenous art including music. Approval of the recipients will be made by the Senate Committee on Awards upon the recommendation of the Office of Indigenous Academic and Community Engagement.

### **Jeanette Funke-Furber and Robert Furber Scholarship\* (Revised)**

A scholarship is awarded to an academically outstanding graduate student in the Faculty of ~~Health Human and Social Development~~ undertaking research in gerontology in order to enhance and advance care for the elderly. Preference is for a student with demonstrated financial need. The scholarship will rotate every other year between a PhD student in the School of Nursing and a Masters or PhD student in the Faculty of ~~Health Human and Social Development.~~ Approval of the recipient will be made by the Faculty of Graduate Studies Graduate Awards Committee upon the recommendation of the Faculty of Health ~~Human and Social Development.~~

**Lii Michif Niiyanaan Award (New)**

One or more awards are given to academically outstanding Metis undergraduate students continuing in the School of Social Work. Approval of the recipient(s) will be made by the Senate Committee on Awards upon the recommendation of the School of Social Work.

**Black Student Leadership Award (New)**

One or more awards of \$7,500 are given to undergraduate students continuing at UVic who self-identify as Black and who have demonstrated outstanding leadership qualities and extracurricular activities that strengthen the student experience at UVic. Students must submit a letter (maximum 300 words) outlining their contribution to the UVic community.

Approval of the recipients will be made by the Senate Committee on Awards upon the recommendation of the Division of Student Affairs.



University  
of Victoria

BOG-May 27/25-24

## SUBMISSION TO THE UVIC BOARD OF GOVERNORS

**Date:** May 12, 2025

**To:** Operations and Facilities Committee

**For:** Decision

**From:** Elizabeth Croft, Vice-President Academic and Provost

A handwritten signature in blue ink, reading "Elizabeth Croft".

**cc:** President and Vice-Chancellor

**Meeting Date:** May 27, 2025

**Subject:** Proposal to establish a Bachelor of Engineering in Biomedical Engineering and Management

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### Recommendation:

*THAT the Operations and Facilities Committee recommend to the Board of Governors that the Board of Governors approve the proposal to establish a Bachelor of Engineering in Biomedical Engineering and Management, as described in the document "Bachelor of Engineering: Biomedical Engineering and Management", and that this approval be withdrawn should the program not be offered within five years of the granting of approval. Once approved by Senate and the Board of Governors, the proposal must be approved by the Ministry of Post-Secondary Education and Future Skills.*

### Background:

The proposed Bachelor of Engineering in Biomedical Engineering and Management program is designed to address the growing demand for skilled professionals in the expanding field of biomedical technology, digital health, and healthcare management. By combining biomedical engineering, healthcare management, and technology commercialization, the program is designed to equip students with the skills required to excel in the biomedical and healthcare sectors. Graduates will be trained to optimize resource allocation by understanding both the technical and financial aspects of project management and drive innovation by identifying unmet clinical needs and translating them into viable solutions.

As the program blends technical engineering expertise with healthcare management and commercialization, it fosters an interdisciplinary approach that follows UVic's vision of innovation and creativity. The program encourages students to collaborate across disciplines, combining biomedical engineering with business and regulatory affairs to solve pressing healthcare problems. This approach is consistent with UVic's priority to build community inside and outside the classroom, facilitating an environment that encourages the exchange of ideas and interdisciplinary learning.

The program addresses the current and future needs of the healthcare and technology sectors while remaining deeply committed to the values of inclusivity, innovation, and global impact that are held by UVic as a whole. The program's focus on interdisciplinary learning, equity, sustainability, and partnerships aligns with the university's mission to provide an excellent, supportive educational environment that contributes to solving some of the world's most complex problems.

**Basis for Jurisdiction:** Senate Committee on Planning meeting April 2, 2025  
Senate meeting on May 2, 2025

**Attachment(s):** May 2025 Senate docket for the proposal to establish a Bachelor of Engineering in Biomedical Engineering and Management.



**Date:** April 15, 2025

**To:** Senate

**From:** Senate Committee on Planning

**Re:** **Proposal to establish a Bachelor of Engineering in Biomedical Engineering and Management**

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At its meeting on April 2, 2025, the Senate Committee on Planning considered the proposal to establish a Bachelor of Engineering in Biomedical Engineering and Management.

The proposed Bachelor of Engineering in Biomedical Engineering and Management program is designed to address the growing demand for skilled professionals in the expanding field of biomedical technology, digital health, and healthcare management. By combining biomedical engineering, healthcare management, and technology commercialization, the program is designed to equip students with the skills required to excel in the biomedical and healthcare sectors.

Graduates will be trained to optimize resource allocation by understanding both the technical and financial aspects of project management and drive innovation by identifying unmet clinical needs and translating them into viable solutions.

**The following motion is recommended:**

That Senate approve and recommend to the Board of Governors that it also approve, the proposal to establish a Bachelor of Engineering in Biomedical Engineering and Management, as described in the document "Bachelor of Engineering: Biomedical Engineering and Management", and that this approval be withdrawn should the program not be offered within five years of the granting of approval. Once approved by Senate and the Board of Governors, the proposal must be approved by the Ministry of Post-Secondary Education and Future Skills.

Respectfully submitted,

**2024 / 2025 Senate Committee on Planning**

Elizabeth Adjin-Tettey, Chair, Associate Vice-President Academic Programs

Alexandrine Boudreault-Fournier, Faculty of Social Sciences

Alexandre Brolo, Faculty of Science

Adam Con, Faculty of Fine Arts

Andrea Giles, Executive Director, Co-op. Education & Career Services

Robin Hicks, Dean, Faculty of Graduate Studies

Fraser Hof, Associate Vice-President Research and Innovation designate

Breanna Lawrence, Faculty of Education

Annalee Lepp, Dean, Faculty of Humanities

Geoff Loomer, Faculty of Law

Tania Muir, Division of Continuing Studies

Anthony Ryan, Student Senator

Maureen Ryan, Faculty of Human and Social Development  
Ada Saab, Associate University Secretary  
Kristin Semmens, Faculty of Humanities  
Stuart Snaith, Peter B. Gustavson School of Business  
Henning Struchtrup, Faculty of Engineering and Computer Science  
Wendy Taylor, Registrar  
Rosemary Webb, GSS representative  
Jie Zhang, Peter B. Gustavson School of Business  
Sandra Duggan, Secretary, Office of the Vice-President Academic and Provost

**UNIVERSITY OF VICTORIA**  
**SUPPLEMENTAL TEMPLATE FOR NEW PROGRAM PROPOSAL – UNDERGRADUATE**

*Bachelor of Engineering: Biomedical Engineering and Management*

<b>Submitted by:</b>	<b>Name and title</b>	<b>Email</b>
Dean or designate	Dr. Mina Hoorfar	Engrdean@uvic.ca
Academic unit, department, or school	Department of Mechanical Engineering	
Name, title, and email of contact person	Dr. LillAnne Jackson (Associate Dean, Undergraduate Programs) & Mohsen Akbari (Associate Professor)	<a href="mailto:engradu@uvic.ca">engradu@uvic.ca</a> , <a href="mailto:makbari@uvic.ca">makbari@uvic.ca</a>
Anticipated start date of proposed program <b>*Note – the program must not be advertised/offered until all approvals are finalized.</b>	Sept. 2026	

**Please provide dates of all approvals**

Required approvals	Date
Pre-consultation with AVPAP (by contact person and Dean/designate)	October 9, 2024
Departmental/School approval	BME: Jan. 21, 2025 ECE: Jan. 27, 2025 MECH: Jan. 20 <sup>th</sup> 2025
Faculty Curriculum Committee approval	Jan. 23, 2025
*Faculty Council approval (or <u>indicate</u> equivalent Faculty voting body)	February 11, 2025

**Please complete all rows with date or N/A**

Consultations (as applicable must be initiated at least 6 weeks before SCP submission deadline; see notes below) <b>*supporting documentation required for all consultations</b>	Date (or N/A)	Supporting Documentation Attached (Y/N)
Libraries – Jonathan Bengtson, University Librarian <a href="mailto:bengtson@uvic.ca">bengtson@uvic.ca</a>	<b>Mar. 7</b>	<b>Y</b>
Co-operative Education and Career Services – Andrea Giles, Executive Director – <a href="mailto:cooped@uvic.ca">cooped@uvic.ca</a>	<b>Mar. 27</b>	<b>Y</b>
Office of the Registrar and Enrolment Management – <a href="mailto:OREGSCPConsultation@uvic.ca">OREGSCPConsultation@uvic.ca</a>	<b>Mar. 14</b>	<b>Y</b>
Indigenous Academic and Community Engagement – Kundoqk Jacque Green, Executive Director, <a href="mailto:iaceconsultations@uvic.ca">iaceconsultations@uvic.ca</a> <b>**Please complete the <a href="#">IACE Consultation form</a> and submit with proposal.</b>		In process, sent on January 14 <sup>th</sup> and followed up on Mar. 7 <sup>th</sup> .
External and Internal Consultation (letters of support as per section F)		<b>Y</b>
<b>Non-standard Tuition</b>	<b>Yes* or N/A</b>	<b>Non-standard form attached (Y/N)</b>

**UNIVERSITY OF VICTORIA**  
**SUPPLEMENTAL TEMPLATE FOR NEW PROGRAM PROPOSAL – UNDERGRADUATE**

Proposed program involves non-standard tuition *If you answered yes, complete the UVic Non-standard <a href="#">Tuition Template</a>	N/A	
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**NOTE:** You should first complete the Ministry of Post-Secondary Education and Future Skills Stage 1 Review for New Degree Proposals Template before completing the UVic Supplemental Template

**A. What are the admission requirements for the proposed undergraduate program?**

This program's proposed admission requirements are:

Applicants from Secondary School:

Grade 11:

- Approved English 11
- Pre-calculus 11
- Chemistry 11
- Physics 11
- Approved Social Studies 11/12

Grade 12:

- English Studies 12 or English First Peoples 12 with at least 67%
- Pre-calculus 12 with at least 73%
- Approved Science 12 course or Calculus 12
- And approved academic 12 course

**B. Curriculum design (include draft curriculum, if applicable, as an appendix) (maximum 2 pages)**

Indicate the program requirements and design, including core and prerequisite courses. Identify which courses already exist at UVic and any new courses to be implemented as a result of the proposed program.

The BEaM program is designed to equip students with the knowledge and skills necessary for careers in biomedical technology, healthcare management, and digital health solutions. The curriculum provides a balance of core courses in engineering, biomedical sciences, and business management, along with specialized courses in regulatory affairs, technology commercialization, and digital health. The program is divided into four years, with each year building upon foundational knowledge and introducing students to the practical application of biomedical technologies in healthcare settings. Several courses in the BEaM program are already part of UVic's Biomedical Engineering and Engineering programs and the program introduces several new courses to address specific industry needs. These new courses, along with selected electives, ensure that graduates of the BEaM program will possess a robust and unique set of skills combining engineering, healthcare, and business management, positioning them as leaders in the biomedical technology and digital health sectors.



**UNIVERSITY OF VICTORIA**  
**SUPPLEMENTAL TEMPLATE FOR NEW PROGRAM PROPOSAL – UNDERGRADUATE**

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A full draft curriculum is included in Appendix A, with course descriptions for the proposed new courses.

- **Does the proposed program involve places for integration of teaching and research? If yes, please provide details.**

Yes, the proposed BEaM program integrates teaching and research throughout the curriculum. The program is designed to expose students to the latest advancements in biomedical technology and digital health through hands-on projects, collaborative research opportunities, and engagement with faculty expertise. This integration allows students to directly apply theoretical knowledge to real-world challenges in the healthcare and biomedical sectors.

Through the curriculum, students will engage in research-driven projects that address current issues in medical device design, biomanufacturing, and digital health. For example, students will plan and work on projects related to wearable devices, the Internet of Medical Things (IoMT), and the design of microfluidic devices for biomedical applications. These projects are aligned with ongoing research initiatives within the Faculty of Engineering and Computer Science, ensuring that students benefit from the faculty's advanced work in fields like biomechanics, medical imaging, tissue engineering, and prosthetics. The program's emphasis on real-world design and regulatory affairs further supports this integration, enabling students to contribute to the development and commercialization of biomedical technologies.

Faculty members will actively involve students in their research labs, providing opportunities to work on innovative projects such as biosensor design, 3D printing technologies, and bioprinting. This hands-on approach will not only deepen students' technical expertise but also enhance their problem-solving and critical thinking abilities, preparing them for both industry roles and further academic studies. By embedding research into the program, the BEAM degree will foster a dynamic learning environment where students can actively contribute to advancing knowledge in the biomedical field.

- **Does the program include opportunities for experiential learning or other forms of community engagement or research-enriched learning?**
  - **Describe use and anticipated outcomes of practica, Co-op, work terms, or other forms of experiential learning and the unit's plans and support to develop placement opportunities. Obtain line authority signature for any resource commitments.**

The BEaM program offers extensive opportunities for experiential learning, community engagement, and research-enriched learning, ensuring that students can apply their theoretical knowledge in real-world contexts. These opportunities are embedded throughout the curriculum and are designed to provide students with practical experience, foster critical thinking, and develop key professional skills.

Experiential learning is integrated into multiple courses, with students engaging in laboratory activities, community-based projects, and health care service initiatives. For example, the program will feature hands-on projects designed to give students the opportunity to develop solutions for real-world challenges, while engaging with health professionals and the community. In addition, students will be encouraged to participate in intensive, collaborative events like hackathons, where they can work in teams to solve complex problems in biomedical technology and health care. The university's partnership with UVic Coast Capital Innovations has a proven track record of successful events that will further enhance students' entrepreneurial skills and innovation.

**UNIVERSITY OF VICTORIA**  
**SUPPLEMENTAL TEMPLATE FOR NEW PROGRAM PROPOSAL – UNDERGRADUATE**

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The program also offers access to Co-op and Work Experience programs, providing students with the option to gain professional experience through placements with industry partners, hospitals, or biomedical research organizations. These placements offer hands-on learning opportunities, allowing students to apply their skills in real-world settings and develop valuable industry connections. Students will also engage in interdisciplinary final projects that simulate industry environments, fostering teamwork, problem-solving, and project management skills. These projects will often involve collaboration with health care providers and may include clinical research, medical device development, or evaluations of existing technologies. The final project serves as a capstone experience, integrating knowledge from across the program and preparing students for careers in biomedical engineering and digital health.

- Opportunities for community-engaged and research-enriched learning
- **Does the program design include plans for distance education delivery? If yes, provide details.**

This program is being proposed as a “face-to-face” program, to be delivered via in-person classes.

**C. Integration of Indigenous perspectives, decolonization, global perspectives, equity, diversity and inclusion (maximum 2 pages)**

- **Does the proposed program provide opportunities to include Indigenous perspectives and decolonization? If yes, please provide details.**

The BEaM program provides opportunities to include Indigenous perspectives and promote decolonization, particularly by addressing health care inequities. The program is committed to incorporating cultural competency, ethical considerations, and Indigenous perspectives across its curriculum to prepare students to engage with the unique healthcare challenges faced by Indigenous communities.

One of the primary ways the program addresses Indigenous health care issues is through the inclusion of the Healthcare Development Management course, where students will learn about the systemic inequities that affect Indigenous populations, including barriers to healthcare access, the underrepresentation of Indigenous voices in healthcare decision-making, and the economic challenges of providing equitable care to these communities. By understanding the economic and policy implications on Indigenous health, students will be better equipped to design solutions that promote greater equity and access to healthcare for these underserved populations. In this course, discussions will focus on the disparities in healthcare outcomes, such as higher rates of chronic disease, mental health issues, and lower life expectancy in many Indigenous communities, and how economic policies can be leveraged to close these gaps.

- **Does the proposed program design provide opportunities for global engagement or international perspectives? If yes, please provide details.**

The BEaM program provides many opportunities for global engagement and the inclusion of international perspectives. The program is designed to prepare students for careers in the global biomedical and digital health sectors by incorporating comparisons of health systems, regulations, and technologies from around the world. This international outlook will be embedded throughout the curriculum to ensure that graduates are equipped to navigate both Canadian and global healthcare markets.

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The proposed curriculum will include international perspectives, highlighting the differences and similarities between the Canadian healthcare system and those in other countries. For example, students will explore global digital health initiatives, regulatory frameworks for medical devices and pharmaceuticals, and the ethical and economic considerations of healthcare delivery in different regions. This comparative approach will not only enhance students' understanding of how biomedical devices and digital health technologies are developed, approved, and marketed globally but also prepare them to address healthcare challenges that extend beyond Canada's borders.

Additionally, the program's focus on emerging technologies will include case studies and projects that examine international applications and the integration of these technologies into diverse healthcare environments. Students will gain insights into how these technologies are used in low-resource settings, as well as their potential for transforming healthcare delivery in both developed and developing countries. By considering global challenges—such as the need for remote health monitoring in rural or underserved areas—students will be equipped to design solutions that are both scalable and adaptable to different international contexts.

Elective co-op and work experience opportunities will further enhance the global engagement aspect of the program by allowing students to potentially work with international companies in the biomedical technology and healthcare sectors. These placements could involve collaborations with global companies, international research projects, or exchanges with institutions focused on global health innovation. The ability to participate in such experiences will help students build an international network and develop the cross-cultural competencies required to succeed in an interconnected, globalized healthcare market.

- **How does the proposed program promote justice, equity, diversity, and inclusion? If yes, please provide details.**

The BEaM program is committed to promoting justice, equity, diversity, and inclusion by ensuring that students are not only equipped with technical expertise but also with the cultural competence and ethical grounding necessary to address the diverse technological needs of patients and communities. The program is designed to foster an inclusive learning environment, support the participation of underrepresented groups, and promote equitable access to healthcare technologies, especially for marginalized populations.

One key aspect of the program is the incorporation of Indigenous health perspectives. By emphasizing these issues, the program encourages students to develop technologies and healthcare solutions that are equitable, particularly to those who have been historically underserved by the healthcare system.

The program also places a strong emphasis on diversity and cultural competency through the integration of global health perspectives. Students will engage in discussions about the diverse needs of populations in different regions and how healthcare technologies can be tailored to meet those needs. The program will encourage students to think critically about the ethical implications of technology deployment, ensuring that it is inclusive and respectful of cultural differences, values, and traditions, particularly in global and underserved contexts.

The program's interdisciplinary approach, which incorporates diverse fields like engineering, health sciences, management and social perspectives, ensuring that students from varied academic backgrounds and experiences can participate and succeed.

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**D. Describe the learning outcomes of the proposed program.**

The BEaM program is designed to equip graduates with a comprehensive skill set to address the many challenges of the rapidly evolving biomedical and digital health sectors. Upon completion of the program, graduates will be able to:

- **Analyze Physiological Control Mechanisms:** Understand and apply principles of human physiology and bioengineering to assess and design solutions that address physiological challenges in healthcare, such as monitoring vital signs, managing chronic conditions, and improving patient outcomes, bringing innovation from the lab to clinical application.
- **Bridge Cutting-Edge Biomedical Discoveries with Real-World Healthcare Solutions:** Leverage advanced biomedical research and emerging technologies to create practical, scalable solutions that address current healthcare challenges.
- **Engage Skillfully with Clinicians and Patients:** Demonstrate effective communication skills when collaborating with healthcare providers and patients, ensuring that biomedical technologies and solutions are both clinically relevant and patient-centered.
- **Perform Biomedical Data Analysis:** Utilize statistical and computational tools to analyze healthcare data, extracting insights that inform decision-making and improve patient care, clinical outcomes, and healthcare system efficiency.
- **Develop and Specify Biomanufacturing Processes for Biomedical Applications:** Design and optimize biomanufacturing processes to produce biomedical devices and therapies, ensuring scalability, quality control, and regulatory compliance.
- **Integrate AI and IoT Technologies into Healthcare Systems:** Employ artificial intelligence and the Internet of Medical Things (IoMT) to improve the efficiency and effectiveness of healthcare systems, enhancing patient outcomes through real-time data collection, analysis, and personalized treatment.
- **Critique Regulatory Challenges in Clinical Trials:** Evaluate and address the ethical, legal, and regulatory challenges associated with conducting clinical trials for medical devices, ensuring compliance with global standards and protecting patient safety.
- **Evaluate Feasibility of Biomedical Technology Commercialization Strategies:** Assess the commercial potential of biomedical innovations, considering factors such as market demand, regulatory requirements, intellectual property protection, and financial viability to ensure successful product development and market entry.
- **Design and Implement Well-Controlled Clinical Trials:** Develop and manage clinical trials for biomedical technologies, ensuring they adhere to ethical standards and regulatory guidelines, while gathering data that supports the safety and efficacy of new healthcare solutions.
- **Design and Evaluate Wearable Technology Solutions for Remote Monitoring and Health Promotion:** Develop innovative wearable devices for patient monitoring, disease management, and health

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promotion, focusing on their application in diverse populations to improve accessibility and healthcare outcomes.

- Assess Telemedicine's Impact on Healthcare Access and Patient Satisfaction: Evaluate the effectiveness of telemedicine services in improving access to healthcare, reducing costs, and enhancing patient satisfaction, particularly in underserved or remote populations.

**E. Describe the enrolment plan for the length of the program (e.g., anticipated number of students in the program at launch and steady state for the expected duration of the program).**

As shown in Appendix A, the proposed program is 60 units that can be completed in four years, with two academic semesters per year.

The Biomedical Engineering Technology program is expected to start in Fall 2026, with 20 students. We anticipate that admissions will increase to 40 per year subsequently for a total of 160 students at steady state. We believe that there will be a moderate to high amount of interest in the program, both domestically and internationally.

**F. Show evidence of consultation with and/or support of related UVic academic units/programs and other BC post-secondary institutions, relevant regulatory or professional bodies (provide copies of letters of support in an appendix).**

Throughout the development of the proposed program, we have sought consultation and feedback from various stakeholders and partners, including the internal support of related UVic units. In particular, we consulted with the Gustavson School of Business, due to the program's focus on management in the biomedical device development sphere, and with the School of Health Information Science within the Faculty of Human and Social Development due to the shared interest in digital health, healthcare delivery systems and accessibility of healthcare. Letters of support are included in this package from:

- Michael Prince, Acting Dean, Faculty of Human and Social Development
- Andre Kushniruk, Director, School of Health Information Science
- Graham Brown, Associate Dean, Gustavson School of Business

We have also consulted with Engineers and Geoscientists British Columbia, the regulatory body for the Engineering profession in BC. They have provided a letter of support, also included in this package.

We have consulted with BCIT, as they have a biomedical technology diploma program. A letter of support is included in this package.

We are in consultation with UBC but a planned meeting had to be moved to after the SCP meeting. A letter of support has been promised by SFU and will be provided soon.

## Appendix A: Proposed Curriculum

The proposed curriculum in the program follows. New courses are highlighted, and descriptions for these follow:

**Year 1:** (15 units, typically 10 courses) Complete all of the following:

- Complete all of:
  - ATWP135 Academic Reading and Writing (1.5)
  - ENGR240 Technical Writing (1.5)
  - MATH101 Calculus II (1.5)
  - PHYS110 Introductory Physics I (1.5)
  - PHYS111 Introductory Physics II (1.5)
- Complete 1 of:
  - CHEM101 Fundamentals of Chemistry from Atoms to Materials (1.5)
  - CHEM150 Engineering Chemistry (1.5)
- Complete 1 of:
  - CSC110 Fundamentals of Programming I (1.5)
  - CSC111 Fundamentals of Programming with Engineering Applications (1.5)
- Complete 1 of:
  - MATH100 Calculus I (1.5)
  - MATH109 Introduction to Calculus (1.5)
- Complete 1 of:
  - MATH110 Matrix Algebra for Engineers (1.5)
  - MATH211 Matrix Algebra I (1.5)
- Complete 1.5 units of elective course(open<sup>1</sup>).

**Year 2:** (15 units, typically 10 courses) Complete all of the following

- Complete all of:
  - BME200 Molecular and Cellular Physiology for Engineers (1.5)
  - BME201 Quantitative Human Physiology (1.5)
  - COM202 Financial Accounting I (1.5)
  - COM250 Fundamentals of Marketing (1.5)
  - CSC115 Fundamentals of Programming II (1.5)
  - ECON180 Introduction to Economics and Financial Project Evaluation (1.5)
  - ECE216 Electricity and Magnetism (1.5)
  - ECE250 Linear Circuits I (1.5)
  - MATH 200 Calculus III (1.5)
- Complete 1.5 units of elective course (open).

**Years 3 and 4:** (30 units, typically 20 courses) Complete all of the following:

- Complete all of:
  - BME320 Engineering Materials with BME applications (1.5)
  - BTM300 Biomedical Regulatory Affairs (1.5)
  - BTM315 Healthcare Development Management (1.5)
  - BTM430 Project Management Biomedical Devices and Digital Health (3.0)
- Complete 1 of:
  - ENT400 Strategic Management for the Entrepreneurship Specialist (1.5)
  - MECH462 Small Business Startup and Organization (1.5)
- Complete 1 of:

- o STAT254 Probability and Statistics for Engineers (1.5)
  - o STAT260 Introduction to Probability and Statistics I (1.5)
- Complete 10.5 units from:
  - o BME335 Biosensors and Instrumentation (1.5)
  - o BTM310 Digital Health (1.5)
  - o BTM311 Wearable Technology (1.5)
  - o BTM312 Telemedicine and Remote Patient Monitoring (1.5)
  - o COM317 Management Accounting I (1.5)
  - o ECON318 Health Economics (1.5)
  - o HINF485 Artificial Intelligence in Health Care (1.5)
  - o BTM412 Health Data Analytics (1.5)
  - o BTM415 Internet of Medical Things (IoMT) (1.5)
  - o BTM416 Clinical Engineering (1.5)
  - o BTM418 Clinical Trials and Research Methodologies (1.5)
  - o BTM317 Technology Commercialization (1.5)
- Complete 3.0 units of courses numbered 3xx or 4xx (upper year, open<sup>2</sup>).
- Complete 6.0 units of elective courses (open).

Courses that are not already in the University of Victoria Calendar:

BTM 3XX Biomedical Regulatory Affairs:

Regulatory frameworks for medical devices, pharmaceuticals, and healthcare products. FDA, EMA, and other global regulations, compliance strategies and the approval process. Regulatory compliance and bringing innovations to market.

BTM 3XX Technology Commercialization:

Regulatory compliance, intellectual property management, market analysis. Strategies for bringing new technologies to market, managing IP portfolios, navigating regulatory landscapes, commercialization pathways.

BTM 3XX Digital Health:

Fundamentals of digital health, emerging technologies, data analytics, ethical considerations. Engaging in the rapidly evolving field.

BTM 3XX Wearable Technologies:

Design, development and applications of wearable devices for health monitoring, diagnostics and treatment. Principles and challenges associated with wearable devices, projects and case studies.

BTM 4XX Health Data Analytics:

Collection, analysis, and interpretation of health data using statistical and computational methods. Data mining techniques, machine learning algorithms, visualization tools, extracting insights from health data for improving patient care, research and healthcare administration.

BTM 4xx Internet of Medical Things (IoMT):

Integration of medical devices into the Internet of Things (IoT). Applications of IoMT in healthcare, including data security, interoperability, and the use of IoT devices for remote monitoring, patient care, and research.

BTM 3XX Telemedicine and Remote Patient Monitoring:

Applications including video conferencing; remote diagnostics; home health monitoring. Benefits and challenges of telemedicine, regulatory and ethical considerations.

BTM 4XX Project Management Biomedical Devices & Digital Health:

Integrates Biomedical knowledge and skills to address real challenges in healthcare and medical technology. Conception, design, validating, costing, project management and marketing plan for a biomedical device or system. Interdisciplinary collaboration, critical thinking, innovation and effective communication.

BTM 4XX Clinical Engineering:

Engineering principles applied to healthcare: design; maintenance; safety regulations; healthcare technology assessment; sustainable life-cycle assessment.

BTM 4XX Clinical Trials and Research Methodologies

Designing and conducting clinical trials. Methodologies, ethical considerations, data analysis, regulatory requirements. Practical insights into trial management. Applying research findings to improve patient outcomes.

BTM 3XX Healthcare Development Management:

Healthcare development applied to healthcare decision-making and management. Economic evaluation methods, healthcare financing, cost-benefit analysis. The systemic inequities that affect Indigenous populations, including barriers to healthcare access, the underrepresentation of Indigenous voices in healthcare decision-making, and the economic challenges of providing equitable care to communities.



## Stage 1 Review Template for BC Public Institutions

The purpose of Stage 1 is to determine the need for a new degree program and to evaluate how it complements other programs currently offered in the BC post-secondary education system. Stage 1 applies to all post-secondary institutions seeking authority to grant a new degree program in BC. It is a means to ensure that students are provided with high-quality education, and when developing new programs, that institutions avoid unnecessary duplication and consider government priorities for social and economic goods, such as principles of diversity and inclusion.

Stage 1 applications must be submitted using this template and **must not exceed 12 pages or 4,000 words**, excluding a three-page Program Overview and appendices. Please complete the following information.

### Program Overview

Provide the following information (a to i) in no more than three pages. *(Shaded boxes will expand or contract to accommodate any length.)*

- a) An overview of the organization's history, mission, and academic goals;

The University of Victoria is an international leader in research that makes a vital impact on people, places, and the planet. Our faculty are committed and inspiring teachers who are essential to our dynamic environment. Here, our students receive a research-enriched education and applied learning opportunities. The university received degree-granting status in 1963. The origins of UVic, however, can be traced back to 1903 and the establishment of Victoria College, our predecessor institution.

- b) Proposed credential to be awarded, including the level and category of the degree and the specific discipline or field of study;

Bachelor of Engineering – Biomedical Engineering and Management

- c) Location of where the proposed degree program will be offered;

University of Victoria, Victoria Campus

- d) Faculty or school(s) offering the proposed degree program;

Faculty of Engineering and Computer Science

- e) Anticipated program start date;

The program is anticipated to start in Fall 2026.

- f) Anticipated completion time in years and semesters;

The anticipated completion time for the Biomedical Engineering and Management program is 4 years, which equates to 8 semesters (2 academic semesters per year).

- g) Expected number of students at launch and at steady state;

At launch, the program is expected to admit 20 students. At steady state, the program is anticipated to have 40 students per year, for a total of 160 students.

- h) A summary of the proposed program, including:

- Aims, goals, and/or objectives of the proposed program;

The BEaM program is designed to address the growing demand for skilled professionals in the expanding field of biomedical technology, digital health, and healthcare management. The program aims to equip students with technical expertise in biomedical engineering and managerial, regulatory, and business skills required to excel in the biomedical and healthcare sectors. By bridging the gap between these disciplines, the program provides students with a well-rounded education that prepares them for real-world challenges in the rapidly evolving healthcare and technology landscapes.

The primary aim of the BEaM program is to provide an interdisciplinary education that combines biomedical engineering, healthcare management, and technology commercialization. It is designed to prepare students to develop, manage, and commercialize innovative biomedical technologies and healthcare solutions. These skills are especially critical for small to medium-sized biotech companies, which represent the majority of firms in this sector and often operate in highly competitive and resource-constrained environments.

Small to medium-sized biotech companies typically lack the extensive infrastructure and specialized teams that larger corporations have, making it essential for their employees to wear multiple hats and possess a diverse skill set. Graduates of the BEaM program will be equipped to bridge the gap between technical innovation and business strategy, enabling them to accelerate product development, navigate regulatory and commercialization challenges to bring cutting-edge technologies to market efficiently. Further, the graduates will be trained to optimize resource allocation by understanding both the technical and financial aspects of project management and drive innovation by identifying unmet clinical needs and translating them into viable solutions.

The program encourages collaboration and interdisciplinary learning, ensuring that students can navigate both the technical and managerial aspects of the biomedical field. The goal is to produce graduates who are equipped not only with the technical knowledge required to solve complex biomedical challenges but also with the ability to drive the commercialization of innovations and address global healthcare needs.

Graduates will gain a comprehensive understanding of biomedical engineering principles, healthcare management strategies, regulatory affairs, and the commercialization processes necessary to bring new technologies to market. The program emphasizes the application of cutting-edge technologies such as artificial intelligence (AI), the Internet of Medical Things (IoMT), and telemedicine, enabling students to design and develop healthcare solutions that improve patient outcomes and address global healthcare challenges.

- A key goal of the program is to promote healthcare equity and access. By integrating Indigenous perspectives into the curriculum and focusing on creating culturally aware and accessible healthcare solutions, the BEaM program encourages students to design technologies that meet the needs of diverse populations, particularly those in underserved communities. The program promotes local and global impact by preparing students to navigate complex regulatory landscapes, intellectual property (IP) considerations, and socioeconomic factors that vary across regions. This comprehensive approach ensures graduates are adept at addressing health challenges in diverse settings, from resource-limited environments to advanced healthcare systems, ultimately strengthening the global workforce in the biomedical and healthcare industries.

Anticipated contribution of the proposed program to the mandate and strategic plan of the institution;

The BEaM program aligns closely with the University of Victoria's mandate and strategic priorities, contributing to the institution's goals for innovation, equity, and interdisciplinary collaboration. UVic's strategic plan emphasizes the importance of tackling global challenges through creativity, interdisciplinary research, and a commitment to inclusivity, values that are inherently reflected in the BEaM program.

The program's design directly aligns with UVic's commitment to providing a transformative educational experience by preparing graduates who are equipped to meet the complex challenges of the biomedical technology and healthcare sectors. As the BEaM program blends technical engineering expertise with healthcare management and commercialization, it fosters an interdisciplinary approach that follows UVic's vision of innovation and creativity. The program encourages students to collaborate across disciplines, combining biomedical engineering with business and regulatory affairs to solve pressing healthcare problems. This approach is consistent with UVic's priority to build community inside and outside the classroom, facilitating an environment that encourages the exchange of ideas and interdisciplinary learning.

In terms of addressing UVic's commitment to equity, the BEaM program is particularly aimed at addressing the needs of diverse communities. It includes the integration of Indigenous perspectives, ensuring that graduates are prepared to design healthcare technologies and solutions that are culturally sensitive and accessible to Indigenous populations. This focus directly supports UVic's priority to redress historical barriers to higher education for Indigenous peoples and create a culture of belonging. Additionally, by preparing students to work in a range of healthcare and technology settings, the program contributes to the university's goal of ensuring equitable access to education and professional opportunities for all students.

The BEaM program also advances UVic's goals related to sustainability and climate action. By emphasizing sustainable biomanufacturing practices and innovative healthcare technologies, the program prepares students to develop solutions that not only address health crises but also minimize environmental impact. This directly supports UVic's commitment to addressing the climate crisis and ensuring a sustainable future.

The BEaM program addresses the current and future needs of the healthcare and technology sectors while remaining deeply committed to the values of inclusivity, innovation, and global impact that are held by UVic as a whole. The program's focus on interdisciplinary learning, equity, sustainability, and partnerships aligns with the university's mission to provide an excellent, supportive educational environment that contributes to solving some of the world's most complex problems.

- Linkages between the learning outcomes and the curriculum design and whether a work- integrated learning experience is required for degree completion;

The BEaM program has been designed to ensure that the curriculum is aligned with the key learning outcomes, preparing students for careers in the biomedical and healthcare sectors. These outcomes will be achieved through a mix of core courses in biomedical engineering, healthcare management, regulatory affairs, and emerging

technologies, which provide a comprehensive education for students to develop both technical and managerial expertise. This alignment between the learning outcomes and curriculum design ensures that students graduate with the practical, analytical, and problem-solving skills required in the biomedical field.

The learning outcomes of the BEaM program focus on three key areas: technical proficiency in biomedical engineering, managerial and regulatory knowledge, and interdisciplinary collaboration and innovation. Students will gain a solid foundation in biomedical engineering principles, including device design, medical technology, and biomanufacturing. These skills will be taught through coursework, laboratory work, and practical applications. The program also emphasizes the development of skills in healthcare management, including understanding the business and regulatory side of biomedical technology, which is essential to enabling students to work in product development, commercialization, and clinical operations. The program also promotes interdisciplinary collaboration, allowing students to work across fields such as engineering, healthcare, business, and policy, ensuring that they can address complex healthcare challenges in a collaborative and innovative manner.

The BEaM program will integrate hands-on and community-based learning in the laboratory and assignment portion of courses, throughout the curriculum.

The BEaM program will offer access to students wishing to participate in a co-op as part of their degree completion. This optional component will allow students to gain practical, hands-on experience in a real-world work environment, bridging the gap between academic learning and professional application.

- Delivery methods (in-person, online, combination of in-person and online (provide ratio of each delivery method), or other (explain);
- 

Delivery will be primarily in-person with some online elements such as use of LMS and other educational technology tools to facilitate students' learning.

- Program strengths; and,

The program offers several strengths that will contribute to its success in meeting the growing demand for professionals in the biomedical and healthcare sectors.

One key strength is the program's interdisciplinary approach. The curriculum integrates biomedical engineering, healthcare management, and business principles, providing students with a blend of technical and managerial expertise. This integration ensures that graduates are equipped with not only the technical knowledge needed to develop cutting-edge biomedical technologies but also the business skills to navigate the commercialization and regulatory aspects of the field. This combination makes the program particularly attractive to employers looking for professionals who can bridge the gap between technology development and real-world healthcare solutions.

The BEaM program is designed to address the needs of the biomedical and healthcare technology industries. Its focus on emerging technologies such as artificial intelligence, digital health, biomanufacturing, and telemedicine ensures that students are prepared to work in high-demand areas of healthcare innovation. The emphasis on practical applications and the commercialization of biomedical devices and technologies ensures that graduates are ready to enter the workforce with skills that are immediately applicable in the industry.

The program is designed to have both local and global impact. While it addresses the specific needs of the biomedical industry in British Columbia, it also prepares students to work in international contexts. The emphasis on global collaboration, regulatory compliance, and the commercialization of healthcare technologies will allow students to contribute to innovations in healthcare both locally and globally. The BEaM program is career-focused, ensuring that graduates are ready to enter the workforce immediately upon completion. With a focus on high-demand roles such as biomedical device development, digital health, regulatory affairs, and healthcare management, the program positions students for successful careers in the rapidly expanding biomedical sector.

UVic's strong research foundation and industry connections are also significant assets for the program. By leveraging the university's established relationships with local and international biomedical technology firms, as well as its cutting-edge research, the program will provide students with access to the latest developments in biomedical technologies and healthcare innovation.

- Classification of Instructional Program (CIP) Code (minimum 4-digit; 6-digit preferred).

The CIP Codes for this program are:

14.0501 Biomedical/medical engineering  
15.0401 Biomedical technology/technician  
26.0102 Biomedical sciences, general  
15.1501 Engineering/industrial management  
52.0116 Science/technology management

- i) Name, title, phone number, and e-mail address of the institutional contact person if more information is required.

Dr. Elizabeth Adjin-Tettey, AVP Academic Programs  
avpap@uvic.ca  
(250) 853-3761

## Standard 1 Benefits to Students

*The institution must demonstrate that the proposed degree will provide benefits to students.*

Criterion Question	Institution Response
Who is the targeted student population?	The BEaM program targets students who are interested in developing expertise at the intersection of biomedical technology, healthcare management, and business. It is designed for individuals from a variety of backgrounds who seek to gain practical, technical skills without necessarily pursuing an accredited engineering degree. The program appeals to those looking to work in biomedical device development, digital health, and healthcare management, offering a streamlined pathway into these high-demand fields. This option is ideal for students who are more focused on applied knowledge and career opportunities rather than traditional engineering pathways. The program is also a potential pathway toward a medical career for students who may be interested in pursuing further medical education.
What specific need is there for the proposed program and how will it benefit the targeted student population?	The proposed program is designed to address a specific need for professionals who are equipped with both technical expertise and management skills in the biomedical technology sector. As healthcare continues to evolve with advancements in telemedicine, artificial intelligence, and biomanufacturing, there is an increasing demand for individuals who can bridge the gap between technology, healthcare, and business. With many biotech companies in Canada being small to medium-sized, there is a need for employees who can wear multiple hats and possess a diverse skill set. This program responds to that demand by offering interdisciplinary components that go beyond what is typically covered in an accredited engineering degree.
Will the proposed program provide specific benefits to Indigenous students in BC's post-secondary system and/or at your institution? If so, describe.	The program aligns with UVic's commitment to redressing historical barriers and creating a culture of belonging for Indigenous students, as outlined in our strategic plan. By incorporating Indigenous perspectives into the curriculum, particularly in healthcare solutions, the program will foster an inclusive learning environment that is culturally relevant and accessible. The interdisciplinary nature of the program will provide Indigenous students with diverse career opportunities in a rapidly growing field while also providing culturally appropriate health care solutions for Indigenous communities.

Will the proposed program specifically benefit those traditionally underserved and underrepresented students in BC's post-secondary system and/or at your institution? If so, describe.	This interdisciplinary program is designed to offer more flexibility than traditional accredited engineering degrees, specifically addressing the needs of individuals who are traditionally underserved and underrepresented in engineering and technical fields. By providing a flexible and accessible curriculum, the program supports diverse learning styles, schedules, and backgrounds, making it easier for individuals from underrepresented communities to engage and succeed. The program's focus on both technical and managerial skills, combined with a multi-disciplinary approach, ensures that students receive a well-rounded education that complements existing engineering degrees. Through its commitment to inclusivity and accessibility, the program aims to diversify the talent pipeline and create pathways for traditionally underserved students to excel in high-demand, high-impact careers.
What specific opportunities are available to program graduates for further study, and at which institutions? If the expectation is that the degree is terminal, state that is the case. Provide evidence of discussions with other post-secondary institutions with regard to advanced degree opportunities in an appendix.	This program is intended as a career-path program targeted towards students who intend to go directly into the workforce upon graduation. However, graduates of the BEaM program may continue at UVic in our Biomedical Systems professional master's program, or may also wish to move into our Mechanical Engineering MEng. They may also choose to go to an institution such as UBC for their MEng in Biomedical Engineering, or their MASc in Biomedical Engineering."
What is the anticipated tuition fee for the program by year and by credit/unit? Include both proposed domestic and international tuition.	The tuition fee will be the Faculty standard tuition for both domestic and international students. The tuition for this degree is also similar to the BSc degrees offered at UVic. Undergraduate tuition in Engineering and Computer Science for domestic students is \$6958 for two terms of study, and for international students it is \$43,384 for two terms of study.
What are the tuition fees for similar programs at this degree level at other post-secondary institutions in the province? If the tuition fee is higher than fees for similar programs in BC, what is the rationale for the higher rate and what actions will the institution take to mitigate student tuition costs?	The tuition is less than similar programs at this level in other institutions in BC. For example, and undergraduate engineering program at UBC is \$7497 for domestic students, and \$63,653 for international students.

## **Standard 2 System Coordination and Program Duplication**

*The institution must establish that the proposed program fills a need within the post-secondary system and that there is no unnecessary duplication with existing programs.*

### **A. System Context**

Use the table below to list all similar degree programs at the same level at other private and public post-secondary institutions in BC. (Add as many lines as required.)

<b>Institution offering similar program</b>	<b>Name of degree program</b>	<b>How the proposed program differs</b>
BCIT	Biomedical Engineering Technology Diploma	It offers a comprehensive, interdisciplinary curriculum that prepares graduates to lead in biomedical device development, commercialization, and management roles, making it a flexible

		and strategic option for those seeking both technical and business expertise in the evolving healthcare technology sector. BCIT's diploma is excellent from a technical standpoint, but does not include the management or regulatory training or business aspects of BEaM.
UBC	BASc Biomedical Engineering.	UBC's biomedical engineering program provides a strong foundation in the engineering and technical aspects of biomedical technologies. The BEaM program builds on this by focusing on the translational, clinical, and management aspects, expanding the skillset acquired in a traditional biomedical engineering undergrad program such as UBC's and UVic's.
SFU	BASc Biomedical Engineering	As with UBC's program, SFU's Applied Science undergraduate program is highly technical and focused on the science and engineering of biomedical devices. The BEaM program builds on this by focusing on the translational, clinical, and management aspects, expanding the skillset acquired in a technical biomedical engineering undergraduate program such as SFU's.

## B. Consultation with Other BC Post-Secondary Institutions

For each institution in the preceding list that offers a similar program at the same level, summarize the form of consultation that occurred with that institution and materials used, and briefly describe the institution's feedback. (Add as many lines as required.)

Name, position, and institution of person consulted	Method of consultation and materials used	Feedback and applicant's response
Anthony Chan, Program Head, Biomedical Engineering, BCIT	Emailed program overview and discussed areas for collaboration	Very positive, interested in potential transfer opportunities. Letter of support included in this package.
SFU	Emailed program overview and requested feedback	Very positive. Letter of support included in this package. Eugene Fiume noted that we should consult with EGBC regarding the use of "engineering" in a non-accredited program, which we had previously done, and a letter of support from EGBC is also included in this package. Eugene also inquired as to whether the program is intended for those who wish to pursue further education, or careers. As it noted within this proposal document, the BEaM program is intended to produce career-ready graduates, the majority of whom we expect to go directly into the workforce. However, some may wish to



		<p>pursue further degrees such as our Biomedical Systems MEng, or to work for a certain amount of time and return to school mid-career in order to upskill. Eugene Fiume also noted the care needed in curriculum development to ensure that students receive the necessary instruction in engineering, biological training, and management to create successful graduates. We considered this feedback carefully in setting the curriculum for this program, and firmly believe that the 4 years of instruction within this particular curriculum will instill the balance of skills required to succeed.</p>
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### C. Rationale for Duplication

If programs with similar learning objectives are currently available in the region or online within the province, what is the specific rationale for establishing another program?

While there are existing programs in the province and online that focus on biomedical engineering and healthcare technologies, the BEaM program offers a distinct value by integrating technical skills with business, management, and commercialization expertise. Most existing programs in BC, such as the University of British Columbia's Biomedical Engineering program or BCIT's Biomedical Engineering Technology diploma, focus primarily on the engineering or technical aspects of the field. The BEaM program, however, targets the application, commercialization, and management of biomedical technologies, which is increasingly in demand within the rapidly growing healthcare technology sector.

Programs such as UVic's own Biomedical Engineering (BME) undergraduate program are focused on accredited engineering degrees, while the BEaM program offers a non-accredited pathway that appeals to students interested in an interdisciplinary approach that integrates technical and management skills that are not typical a traditional engineering degree. This approach allows students to gain skills in areas like healthcare management, biomanufacturing, digital health technologies, and regulatory affairs, filling a gap for those seeking practical, hands-on expertise and leadership roles in biomedical technology.

By providing this alternative route, the BEaM program addresses the growing demand for professionals who can bridge the gap between engineering, business, and healthcare management, ultimately preparing students for roles in biomedical technology commercialization, healthcare management, and biomanufacturing. This broadens the opportunities for students who are interested in innovative healthcare solutions but do not wish to pursue traditional engineering degrees or programs with a narrow focus on technical skills alone.

### D. Collaboration

Describe how the institution will collaborate and/or share resources with other institutions offering related programs, including articulation and laddering agreements. Provide resource sharing agreements and articulating and laddering agreements in the appendix.

We anticipate building a seamless transfer agreement into year 2 or year 2.5 of this program for strong

graduates of BCIT's excellent Biomedical Engineering Technology diploma program and other similar programs that exist either now or in the future.

### **Standard 3 Social and Economic Benefits**

*The institution must demonstrate that the proposed program will serve the economic and social needs of British Columbians.*

#### **A. Social and Economic Benefits**

<b>Criterion Question</b>	<b>Institution Response</b>
What social and economic benefits would the program offer the community, region, or province?	<p>The proposed program will deliver significant social and economic benefits to the community, region, and province by addressing the urgent demand for skilled professionals in the biomedical and healthcare technology sectors. At its core, the program is committed to advancing health equity and overcoming healthcare access disparities by training individuals to develop, manage, and implement innovative technologies tailored to the needs of diverse and underserved populations. By integrating Indigenous perspectives and emphasizing culturally sensitive healthcare solutions, the program ensures that its graduates are equipped to design technologies that are not only effective but also inclusive and accessible. This focus on equity and inclusivity will help bridge gaps in healthcare delivery, particularly for marginalized communities, while simultaneously fostering a more responsive and equitable healthcare system. Through this approach, the program aligns with regional priorities and contributes to a more inclusive and sustainable future for healthcare.</p> <p>Economically, the BEaM program will strengthen the province's position in the rapidly expanding biomedical and digital health industries by producing a highly skilled workforce equipped with the technical, regulatory, and management skills needed to drive innovation. Graduates will contribute to the growth of local biomedical startups, health tech companies, and biomanufacturing sectors, helping to position British Columbia as a hub for health technology innovation. By preparing students for roles in areas such as biomedical device development, healthcare technology commercialization, and biomanufacturing, the program will foster job creation, support entrepreneurship, and boost economic growth in the region.</p>

<p>Reference specific government and community initiatives, plans, and priorities that the proposed program supports.</p>	<p>The proposed program aligns with <a href="#">StrongerBC</a>, the government's economic plan, which emphasizes inclusive growth, clean growth, and fostering innovation across industries. By training graduates skilled in both biomedical technology and management, the BEaM program supports the "Investing in People &amp; Families" priority of StrongerBC, by giving them access to high-demand careers in the biomedical and healthcare sectors. This directly addresses the growing demand for skilled professionals in the health technology and biomedical fields, particularly in British Columbia where the sector is experiencing rapid growth.</p> <p>The program also contributes to BC's <a href="#">Technology and Innovation Policy Framework</a>, which aims to position the province as a global leader in innovation. By emphasizing emerging technologies such as AI, Internet of Medical Things (IoMT), and telemedicine, the BEaM program will train graduates who can lead in these cutting-edge sectors, boosting the development of new healthcare technologies and driving economic growth in the tech and health industries.</p> <p>The BEaM program also supports the <a href="#">Climate Action Plan</a> by incorporating sustainable biomanufacturing practices and innovative healthcare solutions. As the healthcare sector increasingly focuses on sustainability, graduates will be equipped to address both environmental challenges and the need for more sustainable practices in healthcare delivery.</p> <p>The program also aligns with the <a href="#">Indigenous Education in British Columbia Strategy</a> by promoting inclusive education and integrating Indigenous perspectives in the development of culturally relevant healthcare solutions. This ensures that the program supports the educational needs of Indigenous students and contributes to the province's goals of reducing barriers to education and promoting equity in access to healthcare technologies.</p>
<p>What occupations are students most likely to seek or advance in immediately after graduating (limit to 2-3 occupations)? In an appendix, provide written correspondence from a number of potential employers supporting the proposed degree program, stating their organization's total staff numbers and how many of their current staff positions could be filled by program graduates.</p>	<p>21399: Other professional engineers 20010: Engineering managers 22231: Engineering inspectors and regulatory officers</p> <p>Graduates of the BEaM program will have broad range of career opportunities. They may pursue roles such as product manager in medical devices, clinical engineer/manager overseeing hospital equipment, or healthcare consultant offering strategic guidance to improve patient care and operational efficiency. Other potential roles include biomedical engineering project manager, regulatory affairs manager ensuring product compliance, or medical technology sales manager leading sales teams in the healthcare sector. They may also work as an R&amp;D manager, health systems analyst, or as an entrepreneur launching biomedical startups. Additionally, they could manage operations in healthcare or medical device manufacturing, ensure quality and compliance as a quality assurance manager, or oversee data analysis in biomedical fields. These roles combine technical expertise with leadership, strategic decision-making, and management, offering graduates numerous ways to apply their education.</p>

## B. Engagement with Indigenous Peoples

Criterion Question	Institution Response
What is the institution's plan to incorporate Indigenous content in the program?	UVic is committed to integrating Indigenous perspectives into the BEaM program, both in the curriculum and through broader institutional support. This commitment aligns with the university's Indigenous Plan, which aims to incorporate Indigenous knowledge, cultural relevance, and inclusivity into academic programs.
How did the institution work on this application with local First Nations on whose territory the institution is located, and with other First Nations or Indigenous groups or experts?	We have consulted with our Office of Indigenous Academic and Community Engagement (IACE) throughout the development of this proposal. IACE has an Elders program and provides a bridge between UVic and local Indigenous nations.

## C. Engagement with Employers, Community Groups, and Professional Organizations

Criterion Question	Institution Response
Describe the engagement process with relevant employers, community organizations, professional bodies, and program advisory committees. Summarize the materials used and the feedback received from these groups, and state how the proposed program changed in response to feedback. Provide documented evidence of engagement in an appendix.	<p>Throughout the development of the proposed program, we have sought consultation and feedback from various stakeholders and partners, including the below:</p> <ul style="list-style-type: none"> <li>Engineers and Geoscientists British Columbia, regulatory accreditation body. As the program contains "bachelor of engineering" in its title but is not an accredited engineering program, we consulted with EGBC and they have provided a letter of support and approval (included)</li> <li>Internal support: we consulted with other faculties at the University of Victoria and have received support letters from these, including the Gustavson School of Business, and the School of Health Information Science</li> <li>External support: we consulted with several private companies and have received letters of support, including Azor Biotech, Stemcell Technologies, Zivot Limb Preservation Centre, and more to come.</li> <li>External support: We have consulted with Island Health and a letter of support is included in this package. We have also consulted with the Lower Mainland Biomedical Engineering department under Providence Health Care, and a letter of support is also included in this package.</li> </ul>
If the program is primarily relevant to public sector employment, describe the support the program has from government ministries or other public sector employers and explain how the proposed program changed in response to feedback. Provide documented evidence of engagement in an appendix.	The program is primarily relevant to the private sector, however there may be opportunities for graduates in the public sector, especially in public hospitals and health organizations. We have consulted with Island Health (letter of support to come) as well as BC Cancer (letter of support to come).
If the program relates to a regulated profession, summarize the feedback provided by the regulatory or licensing bodies and the responsible Ministry. Provide documented evidence of engagement in an appendix or state "Not Applicable".	We have consulted with Engineers and Geoscientists BC (EGBC) and a letter of support is included. This will be a non-accredited engineering program and they have confirmed that they have no concerns with this.

## Standard 4 Institutional Resources

*The institution must show it has access to sufficient resources to implement and sustain the program.*

Criterion Question	Institution Response
Explain how the proposed program relates to the overall academic plan of the institution or advances the mandate of the institution.	<p>The proposed program is closely aligned with the overall academic plan and mandate of the University of Victoria. For over six decades, UVic has been dedicated to providing high-quality education, advancing research, and promoting community engagement. This program directly contributes to UVic's mission to tackle global challenges, support interdisciplinary research, and create educational opportunities that prepare students for the evolving needs of the workforce.</p> <p>UVic's academic plan emphasizes innovation, interdisciplinary collaboration, and community partnerships, which are central to the BEaM program. The program brings together the fields of biomedical engineering, healthcare management, and business, preparing graduates who can bridge technical and commercial aspects of healthcare technology. This interdisciplinary approach aligns with UVic's goal of fostering innovation by integrating various disciplines to solve complex societal problems, such as improving healthcare accessibility and sustainability.</p> <p>The program also supports UVic's commitment to diversity and inclusion, especially through its focus on Indigenous perspectives and the integration of culturally relevant healthcare solutions. By providing pathways for students from diverse backgrounds to enter the biomedical field, the program contributes to UVic's goals of increasing equity, redressing historical barriers, and ensuring access to higher education for underrepresented communities.</p> <p>The BEaM program also supports UVic's mandate to produce graduates equipped to address global challenges. The curriculum's focus on emerging technologies ties into UVic's commitment to sustainability, climate action, and addressing pressing health crises. The program will produce graduates who can contribute to innovative healthcare solutions, which is aligned with UVic's aspirations to support the development of a knowledge-based economy and global health advancements.</p>
Briefly summarize how well program areas related to the proposed program performed over the last four years and describe how successful performance was defined and measured.	<p>UVic has demonstrated strong performance in areas related to the proposed program, particularly within engineering, interdisciplinary studies, and health programs. UVic's Mechanical Engineering department, supported by faculty researching biomedical devices, has developed a robust Biomedical Engineering program. This, alongside contributions from the Electrical and Computer Engineering department, has positioned UVic as a leader in medical device research and education. Additionally, our focus on interdisciplinary approaches, particularly in the integration of engineering with health-related fields, is exemplified by the success of the Master of Engineering in Biomedical Systems, offered by the Department of Mechanical Engineering. Students from these programs are highly sought after through co-op placements and as</p>

	<p>alumni. Although there is limited elective space within these programs, students have continued to pursue the Minor in Business Administration, often taking additional courses to complement their technical education and advance their career goals. This new program will build on the strengths of the faculty's existing programs and deliver specialized skills in clinical, business, and management areas. The BEaM program is being developed in collaboration with UVic's newly established Faculty of Health, offering the potential for students to take elective courses from this faculty. Additionally, future opportunities to develop combined programs will further enhance our commitment to interdisciplinary education and address the evolving needs of the healthcare and technology sectors. Success in these areas has been measured through academic achievements, research outputs, industry partnerships, and the increasing demand for UVic graduates in the workforce. These established strengths provide a solid foundation for the BEaM program and align with UVic's strategic priorities.</p>
<p>If the proposed program builds on existing programs, how will the existing programs be affected?</p>	<p>This program draws on course material from both UVic's BEng Major program in Biomedical Engineering (BME) and the Minor in Business Administration program. While it builds on these existing programs, it remains distinct by targeting a different market segment. The BEaM program combines technical and managerial training to cater to individuals seeking careers that bridge engineering and business. This differs from the existing BEng program, which focuses more on engineering principles and licensing, and the Minor in Business Administration, which offers foundational business skills. Both programs remain valuable in their own right, addressing unique needs: the BEng program continues to prepare licensed engineering professionals, while the BEaM program equips individuals with the skills to manage and bring technology to market. As such, the proposed program is expected to complement, rather than compete with, the current offerings, drawing new students who seek a multi-disciplinary approach to their careers.</p>
<p>Identify operation resources required to launch and maintain the program (e.g., faculty, staff, student services, capital equipment, classroom/laboratory space, learning resources), and explain how these needs will be met. Provide a budget.</p>	<p>The university has sufficient resources to support the initial start up of the program. As students move into second and third year of the program there will be a need for expanded access to laboratory and classroom space and there will be a need for one to two additional faculty teaching courses proposed in 3<sup>rd</sup> and 4<sup>th</sup> year of the program.</p>
<p>Provide an enrolment plan for the program over the next four years, identifying projected number of students (full-time and part-time; domestic and international), minimum viable enrolment, and anticipated number of credentials to be awarded each year.</p>	<p>As shown in Appendix A, the proposed program is 60 units that can be completed in four years, with two academic semesters per year.</p> <p>The Biomedical Engineering Technology program is expected to start in Fall 2026, with 20 students. We anticipate that admissions will increase to 40 per year subsequently for a total of 160 students at steady state. We believe that there will be a moderate to high amount of interest in the program, both domestically and internationally.</p>

## Bachelor of Engineering in Biomedical Engineering and Management Internal Consultations

### **OREM**

Thanks for the opportunity to consult and provide feedback on the proposal for the new BEAM program. Please note that my team reviewed the earlier version of the proposal, while I reviewed the PDF version sent along by LillAnne. I copied over the team's comments from the Word version into the PDF during my review so some comments may already be resolved in the updated version (see attached). In addition, I've included further feedback from other teams in OREM at the bottom of this email who also reviewed the earlier version of the proposal.

As my team notes, there are many implementation details that will need to be worked out as it relates to optional coop and progression for a 60-unit degree, rather than the accredited BENG degree. Coop and Career Services and Tuition Fees will also need to be involved in a discussion about optional coop for this program in addition to OREM. OREM will need to set up other new codes and configurations in Banner to support this new program once it is approved. It will be important that sufficient time is provided to work out these details before the program is offered for the first time.

I noted that the support letters to date focus on offering this program with a TNE partner. Given our commitment to create programs that can be offered at our Gordon Head campus as well as with TNE partners, it will be important to flesh out the proposal and letters of support to demonstrate that this program has value and support to be offered in Victoria.

Please accept this email as support from the Office of the Registrar and Enrolment Management for your proposal.

Best,  
Wendy  
[OREM feedback](#)

CURR caught a discrepancy between the changes outlined in the attachment vs the [proposal in Quali](#):

Year two	
Attachment	Quali
STAT 254 or STAT 260 - Introduction to Probability and Statistics I	MATH200 – Calculus III

RISS had a few notes on setting up an optional co-op work term:

- Other than CSC, no program in Engineering has an optional co-op program. It's our understanding that BEng students pay a small co-op fee per term over the duration of their degree, rather than paying per work term. Tory would need to be involved in setting this up.
- Recognizing that the faculty is hoping to move away from the current use of attributes in academic year progression, an optional co-op program would also not be congruent with the current Engineering attribute progression. While attributes are still in use, someone will need to manually review and update the attributes for non-co-op (and WKEX) students.

RISS also noted that the letter of support from the regulatory officer of Engineering and Geoscientists BC seems to indicate that this program will be offered in Singapore. I see in the other supporting emails reference to this being a TNE proposal but the specifics aren't noted anywhere else in the proposal, so this flagged for them in terms of the possible need for a new campus code.

Finally, a note that updates will be required to the GFS rating code in SAARRCT and associated SOAXREF. Both Engineering and ADMS use these ratings to indicate applicant preferences for majors and RISS does some ad-hoc reporting on these as well.

## **Libraries**

Thank you for sharing the proposal for the Biomedical Engineering and Management (BEaM) program. I am pleased to inform you that the UVic Library is well-prepared to support this initiative with our existing resources.

Our library offers an extensive collection of engineering texts, journals, and digital resources that align seamlessly with the BEaM curriculum. We provide foundational and specialized healthcare knowledge alongside interdisciplinary engineering materials. By offering specialized technical and interdisciplinary library materials in health sciences and engineering, these resources will support biomedical engineering students in both technology and healthcare coursework, fostering a robust, inclusive educational experience.

To support the new program, students will have full access to our comprehensive collections, including online access to licensed resources. We offer a wide range of key engineering resources, such as:

Medline with Full Text, CINAHL Complete, Web of Science Core Collection, Applied Science & Technology Index (EBSCO HW Wilson), IEEE Xplore, the Engineering Village databases (Compendex and Inspec), the ACM Digital Library, ASCE Library, and the SPIE Digital library.

Additionally, the UVic Library subscribes to several relevant e-book packages, including ASM Handbooks Online, ScienceDirect, and O'Reilly Learning (formerly Safari Books Online). We have established Evidence-Based Acquisition (EBA) agreements with publishers like Cambridge University Press, JSTOR, Oxford University Press, Taylor & Francis, and Wiley for their eBooks. Access to essential technical specifications, standards, and codes through platforms like ASTM, IEEE Xplore Standards, ASME Standards, and standards on demand is also prioritized. Our online collections are more than sufficient to meet the needs of all students in the Faculty of Engineering and Computer Science.

The library is dedicated to supporting the BEaM program, which will serve as a valuable stepping stone for those pursuing further education in medical school, advanced biomedical engineering studies, or specialized careers within the healthcare and technology sectors. We believe our existing resources will effectively support the program's objectives and enhance its overall impact.

Please feel free to contact me if you have any questions or require further information.

Sincerely,

Aditi Gupta, M.Sc., M.L.I.S.



## **Co-op**

Hi LillAnne

Yes, this does reflect our conversation today.

Regards,

Andrea

- "Optional UG ENGR program":  
*Yes, the optional Co-op is new to the Engineering programs, and specifically for this particular program only.*
- "Need to think about ENGR program fee":  
*Right. As you and I and Meeta have all separately discussed, we will need to except this program from the ENGR program fee, the fee that is collected every term for the mandatory coop programs in our faculty. This is an administrative process that we will need to manage, once the program is established.*
- "How will we decide # of students eligible for optional co-op":  
*These students will likely choose co-op at the same rate as the BSc students across the Faculty of ECS and across the university, approximately 30%.*
- "Is there room, availability and funds available in this system to support hiring co-op students? What Labour Market intelligence has been done?"  
*30% of 20-40 students is 6-12 coop students. I provided you with the labour market indicators that we have included with the proposal.*
- "Interesting - not accreditable"  
*Yes, interesting. While there is some overlap in the careers these students will hold with those of the accredited Biomedical Engineering program, there are many other related roles that do not need licensure as a professional engineer and, thus, there is no need for accreditation.*  
*The Engineering professional body in BC has indicated that we direct students from this program who may be interested in licensure in their futures to contact them.*

February 9, 2025

To whom it may concern,

I am writing this letter of support for the Bachelor of Engineering: Biomechanical Engineering and Management proposal. I have reviewed the proposal and consulted with Associate Dean LillAnne Jackson, as well as with my HINF faculty about the proposal. We are supportive of the proposed program as it will equip students with a unique combination of skills in biomedical engineering that are needed and in demand. The courses have been carefully selected to ensure that students develop a good set of skills at the intersection of engineering, management and healthcare. The integration of teaching and research throughout the curriculum should lead to a balanced student experience where faculty members are actively involved in involving students in their research labs, as well as through experiential learning through co-op and work experience programs.

The School of Health Information Science will be able to support the program by offering several potential electives to them that they might choose to take as part of the elective requirement of the proposed program – these can include the following potential electives from Health Information Science : Introduction to the Canadian Health Care System (HINF 140), Legal and Security Issues in Health Informatics (HINF 330), Information Technology Procurement (HINF 351) and Artificial Intelligence in Healthcare Care (HINF 485).

We look forward to the new program and support it. Please let me know if you have any questions or need more details from the perspective of the School of Health Information Science.

Yours sincerely,



Andre Kushniruk, PhD, Professor and Director

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February 13, 2025

Dr. Mina Hoorfar, Dean  
c/o Faculty of Engineering and Computer Science  
University of Victoria

Email: [engrdean@uvic.ca](mailto:engrdean@uvic.ca)

Dear Mina,

Thank you for sharing the program overview of the new undergraduate program in your Faculty, the Bachelor of Engineering in Biomedical Engineering and Management (BEaM).

I applaud you and your colleagues in developing such an innovative and imperative program that speaks to a rich bundle of practice and professional opportunities.

Various connections and potential collaborations between this new program and those in the new Faculty of Health readily come to mind – Health Information Science clearly, along with Nursing, and Public Health and Social Policy. I see meaningful shared interests in digital health, healthcare delivery systems generally, and the accessibility of health care more specifically, and attaining equitable health outcomes for a range of communities, including First Nations and other Indigenous communities.

I can imagine that the BEaM program would nicely complement and inform our thinking in developing a new baccalaureate in health studies in the Faculty of Health.

I am pleased to express my support for this exciting and significant program proposal.

Warm regards,



Michael J. Prince, CM, PhD  
Acting Dean  
Faculty of Human and Social Development

March 7, 2025

To: Dr. Mina Hoorfar  
Dean, Faculty of Engineering and Computer Science  
University of Victoria

From: Dr. Colin McDonald  
Co-Director (Engineering) Integrated Biomedical Engineering and Health Sciences Program  
McMaster University

Date: March 7, 2025

Re: Support for the University of Victoria's Bachelor of Engineering in Biomedical Engineering and Management Program

---

Dear Dr. Hoorfar,

With this letter, I am pleased to offer my support for the University of Victoria's new undergraduate program in Biomedical Engineering and Management (BEaM). As Director of another biomedical engineering program, I have seen firsthand the value a program such as this offers in terms of fostering an entrepreneurial mindset, promoting interdisciplinary learning opportunities, preparing graduates for high-demand opportunities, and attracting top students across the country.

### **Innovation and Entrepreneurship**

While there is no shortage of academic excellence in the research space across the biomedical sector, the translation from benchtop to bedside requires graduates with the confidence and capability to commercialize academic breakthroughs so they can make real impact in healthcare.

### **Interdisciplinary Learning**

Biomedical Engineering is, by its very nature, an interdisciplinary field. An interdisciplinary learning environment inherently fosters opportunities for students to connect ideas and concepts across different disciplines, forcing them to explore beyond the superficiality of a given topic. By integrating biomedical engineering with a focus in management, students will better understand drivers of biomedical innovation and challenges associated with the development, regulatory approval and commercialization of medical devices.

### **Emerging Market Needs**

Rather than striving to prepare students for a specific field, universities need to focus on preparing students for navigating the ambiguity of an uncertain future. The BEaM Program excites me in that, by exposing students to diverse yet interrelated topics in biomedical engineering and management, it will future proof them by setting them up for opportunities in many sectors, not just a niche field.



As evidence of this, McMaster's iBioMed Program, which draws many parallels to the proposed BEaM program, has successfully prepared our graduates for careers in industry, academia, medicine, and independent ventures.

### **Attracting the Best Students**

Biomedical engineering programs, and interdisciplinary programs in general, tend to attract high-achieving students that have already demonstrated academic success, and I would expect this new program to positively impact the University's reputation by drawing in more of the brightest students to explore technical fields. A program such as this also promises to bridge the equity gap in engineering. There is little question that female-identifying individuals remain significantly underrepresented in engineering and STEM careers. Engineering programs that explore topics in the biomedical space have the highest proportion of female-identifying students of any engineering discipline, with female-identifying students accounting for 50% of enrollment or higher (Engineers Canada, 2021).

To summarize, I am highly supportive of the University of Victoria's new program in Biomedical Engineering and Management. A program such as this, which focuses on multiple disciplines, will create more opportunities for tackling real-world problems in the classroom that are inherently interdisciplinary, giving students improved transferrable skills and leaving them better prepared for opportunities in the future.

Regards,

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Colin McDonald, PhD, PEng  
Co-Director (Engineering), Integrated Biomedical Engineering  
and Health Sciences (iBioMed) Program  
Associate Professor, Department of Mechanical Engineering  
McMaster University  
Office: MDCL-3515/D  
Phone: (905) 525-9140 x24131



# McGill

## Department of Bioengineering

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Prof. Mina Hoorfar, Dean  
Faculty of Engineering and Computer Science  
University of Victoria

26 February 2025

Dear Dr. Hoorfar,

Thank you for sharing the details of your proposed Biomedical Engineering and Management BEng. At McGill, we are committed to the advancement of bioengineering education that empowers students to think beyond traditional boundaries and collaborate across disciplines. We recognize that the future of biomedical engineering lies not only in technical expertise but in the ability to lead teams, manage projects, and navigate complex regulatory environments. I believe that your program's approach to integrating these crucial skills will provide UVic students with an excellent foundation for leadership in the biomedical field.

The interdisciplinary nature of your proposed BEng is a commendable feature. By blending engineering principles with management expertise, you will produce graduates who can address real-world challenges at the intersection of healthcare, innovation, and business. This is an especially timely initiative as the need for professionals capable of translating biomedical technologies into effective, scalable healthcare solutions grows, particularly in underserved and remote areas. The integration of international healthcare challenges and an emphasis on healthcare equity, including Indigenous health issues, will also provide students with a broad and empathetic understanding of the healthcare landscape.

As founding Chair of the Department of Bioengineering at McGill's Faculty of Engineering, I see a critical need to cultivate a new generation of leaders who are not only skilled in the technical aspects of biomedical engineering but also adept at navigating the complexities of healthcare systems and business management. As such, I am excited about the potential impact your new BEng program will have on the field of biomedical engineering and healthcare innovation, and I am happy to offer my support and that of my department for this initiative. I look forward to the success of the program and the future leaders it will produce.

Yours sincerely,

Dan V. Nicolau

Marika Zelenka Roy Chair in Bioengineering  
Department of Bioengineering,  
Faculty of Engineering  
McGill University  
McConnell Engineering Building, Room 353  
817 Sherbrooke Street West  
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February 26, 2025

Faculty of Engineering and Computer Science  
University of Victoria  
3800 Finnerty Road  
Victoria BC V8P 5C2  
Canada

Dear Dr. Mina Hoorfar,

On behalf of the Department of Biomedical Engineering at Toronto Metropolitan University, I am pleased to offer support for the University of Victoria's proposed Bachelor of Engineering in Biomedical Engineering and Management. We recognize the increasing need for innovative educational approaches that bridge engineering, healthcare, and management in a manner that is both forward-thinking and responsive to the evolving needs of the global healthcare landscape.

The proposed program aligns well with the trajectory of biomedical engineering, a field expected to grow by 7% between 2023 and 2033, according to the U.S. Bureau of Labor Statistics. This outpaces the average for all occupations, reflecting a rising demand for professionals who can develop and implement healthcare innovations. Additionally, the global biomedical engineering market is projected to reach \$3.88 trillion by 2030, driven by advancements in medical technology, aging populations, and increased healthcare expenditures.

By integrating essential management training alongside technical biomedical expertise, the program will equip students to navigate the \$500 billion global medical device industry, ensuring they are well-prepared for roles in healthcare commercialization, regulatory compliance, and technology integration. This is particularly crucial as over 75% of biomedical innovations fail at the commercialization stage due to gaps in business acumen and regulatory understanding. Addressing this challenge through interdisciplinary education will significantly enhance graduates' career readiness and their ability to bring medical technologies to market successfully.

The interdisciplinary approach of the program will benefit students by fostering diverse skill sets and offering practical training opportunities that blend engineering principles with business, ethics, and healthcare policies. This is in line with the values we uphold at TMU's Biomedical Engineering program, where students not only engage in cutting-edge research but also have the opportunity to collaborate with top clinical and industry partners. This connection between clinical experience and academic learning is essential for developing biomedical engineers who can create impactful, real-world healthcare solutions.

TMU is committed to encouraging an environment of partnership and knowledge-sharing within the biomedical engineering community, and we look forward to supporting and collaborating with UVic as you move forward with this exciting new initiative. We offer our best wishes for the success of the program and are eager to see the positive impact it will have on students, healthcare systems, and society at large.

Sincerely,



Dr. Dafna Sussman, PhD, PEng

**Director, Biomedical Engineering Graduate Program**

Associate Professor, Biomedical Engineering & Biomedical Physics, Toronto Metropolitan University (formerly Ryerson University)

Adjunct Professor, Obstetrics and Gynaecology, University of Toronto

Director, Maternal-Fetal Imaging Lab

Affiliate Scientist, The Keenan Research Centre for Biomedical Science, St. Michael's Hospital

Member, Institute for Biomedical Engineering, Science and Technology (iBEST) at Toronto Metropolitan University and St. Michael's Hospital

Editorial Board Member, Scientific Reports, Springer Nature

Tel: (416)-979-5000 ext. 553767

[www.torontomu.ca/dsussman](http://www.torontomu.ca/dsussman)



May 28, 2025

Dear Dr. Hoorfar,

On behalf of the Biomedical Engineering Technology Program at the British Columbia Institute of Technology (BCIT), I am pleased to express our support for the proposed Bachelor of Engineering in Biomedical Engineering and Management program at the University of Victoria. We believe this innovative initiative will play a vital role in meeting the growing demand for skilled professionals in the healthcare industry.

BCIT's Biomedical Engineering Technology diploma program equips students with a strong technical foundation in the hospital and medical device sectors, preparing them for successful careers. With approximately 40% of our students joining directly from high school, many seek opportunities to further their education. Your proposed program's combination of technical expertise and management training offers an excellent pathway for our graduates to pursue leadership roles in the biomedical and healthcare fields.

We are eager to explore collaboration opportunities, including a seamless transfer process between our diploma program and your proposed degree. Such a partnership would enable our graduates to enhance their skills in healthcare technology management and commercialization while expanding their perspectives on global healthcare solutions.

We believe this program will positively impact British Columbia's economy by strengthening the biomedical engineering sector and preparing graduates to drive innovation, commercialization, and healthcare advancements. We look forward to discussing further opportunities for collaboration.

Sincerely,



Anthony Chan, PhD, PEng, CEng, CCE  
Program Head, Biomedical Engineering Technology



March 31, 2025

Dr. Mina Hoorfar, Dean  
Faculty of Engineering and Computer Science, Mechanical Engineering  
University of Victoria, 3800 Finnerty Rd.  
Victoria, BC V8P 5C2

Via Email: [Engrdean@uvic.ca](mailto:Engrdean@uvic.ca)

Dear Mina,

**Re: Proposed University of Victoria (UVic) Biomedical Engineering and Management program (BEaM).**

In response to your email from March 12, 2025, regarding the planned launch of a new Biomedical Engineering and Management program (BEaM) at the University of Victoria, EGBC is always encouraged to see reputable post-secondary institutions, such as the University of Victoria, developing new learning opportunities for those entering the engineering profession. With the implementation of the *Professional Governance Act* in February 2021, Engineers and Geoscientists BC has affirmed its role as a regulator whose primary purpose is to protect the public interest. This means that as an organization we cannot endorse specific post-secondary programs.

On behalf of Engineers and Geoscientists BC, we would like to express that we have no objection to the launching of the new UVic Biomedical Engineering and Management program (BEaM). As with any non-accredited programs, we would encourage prospective students of this program to contact Engineers and Geoscientists BC should they have any questions on how to meet the academic standards for registration.

We hope that all the hard work developing this program will be recognized by the government and commend your devotion to the promotion of continued learning especially in a practice area that is becoming increasingly important today.

Regards,

David A. Pavan BSc. Pharm, RPH, CSC,  
Registrar and Chief Regulatory Officer  
Engineers and Geoscientists British Columbia

# Letter of Support for the Proposed Bachelor of Engineering in Biomedical Engineering and Management (BEaM) Program



**Brock Schuman, PhD**  
CEO, Azor Biotek  
Brock@azorbiotek.ca  
250 899 8305  
2/24/2025

To Whom It May Concern,

As a biomedical entrepreneur deeply engaged in the development and commercialization of cutting-edge healthcare solutions, I am pleased to provide my full support for the proposed Biomedical Engineering and Management (BEaM) undergraduate degree at the University of Victoria. This innovative program is uniquely positioned to bridge the gap between technical expertise and the essential business acumen required to translate biomedical advancements into impactful real-world applications.

Home to a surprising number of world-renowned biomedical ventures, Victoria, and UVic's Biomedical Engineering department especially, is an excellent location to become world leaders in biomedical management education. The BEaM's proposed interdisciplinary approach directly addresses challenges that I myself would have benefited greatly from as I transitioned from biomedical scientist to entrepreneur. By equipping students with both technical and commercialization skills, this program will cultivate a cohorts of professionals capable of accelerating the development and deployment of life-changing medical technologies. The inclusion of Indigenous health perspectives and a focus on healthcare equity align well with the University's social responsibilities, and will be a positive influence on the responsible development, advancement and utilization of biomedical technologies for the development of innovative solutions to address unmet treatment needs.

From an entrepreneurial standpoint, the BEaM program will serve as a crucial talent pipeline for student-led ventures in biomedical innovation. By fostering a strong foundation in engineering and business, the program will empower students to take their ideas from concept to commercialization. This is particularly beneficial for early-stage startups, where a deep understanding of product development, market validation, and regulatory strategy can significantly enhance the chances of success. Furthermore, the optional co-op component provides an excellent opportunity for students to gain hands-on experience in industry settings, strengthening their ability to launch and scale impactful healthcare solutions.

As someone who actively mentors and collaborates with emerging biomedical startups, I anticipate that BEaM graduates will be highly sought-after contributors in the field. Whether as founders, product developers, or commercialization experts, these students will be well-positioned to drive innovation in both established companies and entrepreneurial ventures. The program's streamlined four-year structure ensures that students can enter the workforce sooner, making an immediate impact in the fast-evolving biomedical and digital health industries.

In conclusion, I strongly endorse the establishment of the BEaM program at the University of Victoria. This initiative aligns with the urgent need for professionals who can effectively bridge the technical, regulatory, and business aspects of biomedical innovation. I look forward to seeing the program's graduates contribute to transformative advancements in global healthcare and would welcome opportunities to collaborate with the university in supporting student-led ventures and industry partnerships.

Sincerely,

**Brock Schuman, PhD**  
CEO, Azor Biotek  
Brock@azorbiotek.ca  
250 899 8305  
2/24/2025



Dr. Mina Hoorfar, Dean  
Faculty of Engineering and Computer Science  
University of Victoria  
3800 Finnerty Road  
Victoria, BC V8P 5C2

Dear Dr. Hoorfar,

On behalf of STEMCELL Technologies, I am pleased to express my strong support for the proposed Bachelor of Engineering in Biomedical Engineering and Management (BEaM) program at the University of Victoria. As Canada's largest biotechnology company, we recognize the increasing need for interdisciplinary programs that integrate biomedical engineering expertise with management skills to prepare the next generation of leaders in healthcare innovation and commercialization.

The BEaM program's focus on both technical excellence and leadership aligns well with industry demands, ensuring graduates are equipped to drive technological advancements and contribute meaningfully to global healthcare solutions. Additionally, the program's emphasis on Indigenous health perspectives and healthcare equity highlights its commitment to addressing key societal challenges.

At STEMCELL Technologies, we are committed to fostering a strong talent pipeline that supports the biotechnology and life sciences sectors. The BEaM program will play a vital role in developing skilled professionals who can navigate the intersection of engineering, business, and healthcare, ensuring continued innovation and progress in the field.

I fully endorse this initiative and commend the University of Victoria for its forward-thinking approach. I look forward to witnessing the positive impact of this program on the industry and broader society.

Warm regards,

*Allen Caves*

President & CEO  
STEMCELL Technologies



# Zivot Limb Preservation Centre

Peter Lougheed Centre  
Room 5905 5<sup>th</sup> Floor, East Wing  
1 403.943.6400  
zlpcinfo@gmail.com

March 11, 2025

To Whom It May Concern,

My name is Dr. Karim Manji and I am writing in support of the University of Victoria's proposed Biomedical Engineering and Management (BEaM) undergraduate degree.

As a Podiatric Surgeon and Director of the Zivot Limb Preservation Centre, I provide care for diabetic patients with foot ulcers and infection, who are often times at risk of diabetes-related lower limb amputation. These patients not only have complex medical needs but often also face social barriers that exacerbate health issues. Providing care requires a multidisciplinary team for routine surveillance, advanced wound care, optimization of blood flow, Limb Preservation Surgery and a strong understanding of social circumstances.

As we navigate this process with each of our patients we are always looking for ways to advance the care we can provide through both education and research. Over the years we have collaborated with many biomedical engineers, start-ups and health technology companies to trial wearable technology, topical solutions and wound healing technology. Additionally, we have also worked with partners to contribute to the body of knowledge surrounding diabetic foot disease and amputation prevention, for example, through creating AI databases for wound assessment education.

It has been exciting to see significant advancement in the field of biomedical engineering, and feel that it is a critical component when looking at enhancing our healthcare system, increasing access to care, and also bolstering health outcomes for all Canadians. However, from our experience at ZLPC, there are many challenges that biomedical engineers and start-ups seem to face, these include understanding the local context of the healthcare system, social context of target patient population, and business management - how to demonstrate the effectiveness of their product in the industry through running effective trials and the ability to commercialize these products.

The proposed Biomedical Engineering and Management (BEaM) undergraduate degree from the University of Victoria, from my perspective, will be invaluable to the growth of the profession and enhancement of healthcare in Canada, as it will provide the multidisciplinary approach to health technology that will bridge the gap that is currently being experienced. With technical expertise in biomedical devices as well essential management skills for commercialization, healthcare management, and emerging technology integration, all anchored in a strong understanding of social context, graduates from this program will be equipped with all the tools required to successfully launch their products and ensure that their products have the intended impact on health outcomes.

If you have any questions, please do not hesitate to reach out. I truly believe in the potential of this program and look forward to working with the graduates.

Sincerely,

A handwritten signature in black ink, appearing to read 'K. Manji'.

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**Dr. Karim A. Manji**

Clinical Assistant Professor  
Section of Podiatric Surgery  
Department of Surgery  
University of Calgary  
Director, Zivot Limb Preservation Centre



University  
of Victoria

BOG-May 27/25-25

## SUBMISSION TO THE UVIC BOARD OF GOVERNORS

**Date:** May 12, 2025

**To:** Operations and Facilities Committee

**For:** Decision

**From:** Elizabeth Croft, Vice-President Academic and Provost

A handwritten signature in blue ink, reading "Elizabeth Croft".

**cc:** President and Vice-Chancellor

**Meeting Date:** May 27, 2025

**Subject:** Proposal to establish a non-credit certificate program in Data Analytics

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### Recommendation:

*THAT the Operations and Facilities Committee recommend to the Board of Governors that the Board of Governors approve the proposal to establish a non-credit certificate program in Data Analytics, as described in the document "Certificate in Data Analytics (non-credit)", and that this approval be withdrawn should the program not be offered within five years of the granting of approval.*

### Background:

For over 30 years, the Division of Continuing Studies (DCS) has offered non-credit diploma, certificate and micro-credential programs designed to meet the needs of adult learners seeking professional development opportunities to grow or enhance their current professional skillsets. As labour market demands change, DCS seeks to continually update its offerings of core professional development opportunities to ensure alignment with professional opportunities locally, provincially, nationally, and internationally.

The Division of Continuing Studies is proposing to establish a non-credit certificate in Data Analytics that is designed to provide students with a comprehensive understanding of data analytics principles and practices and is structured to cater to both novices and professionals seeking to deepen their expertise in data analytics.

The proposed program builds on the existing non-credit micro-credential in Business Intelligence and Data Analytics (BIDA) and is a laddering option for the Diploma in Data Analytics for Management Science. The proposed certificate provides an opportunity to meet the needs of both current and future learners, as well as BIDA graduates interested in a more fulsome program in this discipline.

The proposed program will strongly align with labour demands, preparing graduates to work as data analysts, or lead data-driven decisions in their chosen sector.

**Basis for Jurisdiction:** Senate Committee on Planning meeting April 2, 2025  
Senate meeting on May 2, 2025

**Attachment(s):** May 2025 Senate docket for the proposal to establish a non-credit certificate program in Data Analytics.





**Date:** April 15, 2025

**To:** Senate

**From:** Senate Committee on Planning

**Re:** **Proposal to establish a non-credit certificate program in Data Analytics**

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At its meeting on April 2, 2025, the Senate Committee on Planning considered the proposal to establish a non-credit certificate in Data Analytics.

The Division of Continuing Studies is proposing to establish non-credit certificate in Data Analytics that is designed to provide students with a comprehensive understanding of data analytics principles and practices and is structured to cater to both novices and professionals seeking to deepen their expertise in data analytics.

The proposed program builds on the existing non-credit micro-credential in Business Intelligence and Data Analytics (BIDA) and is a laddering option for the Diploma in Data Analytics for Management Science. The proposed certificate provides an opportunity to meet the needs of both current and future learners, as well as BIDA graduates interested in a more fulsome program in this discipline.

**The following motion is recommended:**

That Senate approve and recommend to the Board of Governors that it also approve, the proposal to establish a non-credit certificate program in Data Analytics, as described in the document, "Certificate in Data Analytics (non-credit)", and that this approval be withdrawn should the program not be offered within five years of the granting of approval.

Respectfully submitted,

**2024 / 2025 Senate Committee on Planning**

Elizabeth Adjin-Tettey, Chair, Associate Vice-President Academic Programs

Alexandrine Boudreault-Fournier, Faculty of Social Sciences

Alexandre Brolo, Faculty of Science

Adam Con, Faculty of Fine Arts

Andrea Giles, Executive Director, Co-op. Education & Career Services

Robin Hicks, Dean, Faculty of Graduate Studies

Fraser Hof, Associate Vice-President Research and Innovation designate

Breanna Lawrence, Faculty of Education

Annalee Lepp, Dean, Faculty of Humanities

Geoff Loomer, Faculty of Law

Tania Muir, Division of Continuing Studies

Anthony Ryan, Student Senator

Maureen Ryan, Faculty of Human and Social Development

Ada Saab, Associate University Secretary

Kristin Semmens, Faculty of Humanities

Stuart Snaith, Peter B. Gustavson School of Business  
Henning Struchtrup, Faculty of Engineering and Computer Science  
Wendy Taylor, Registrar  
Rosemary Webb, GSS representative  
Jie Zhang, Peter B. Gustavson School of Business  
Sandra Duggan, Secretary, Office of the Vice-President Academic and Provost

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*Certificate in Data Analytics (non-credit)*

Submitted by:	Name and title	Email
Dean or designate	Dr. Jo-Anne Clarke, Dean, Division of Continuing Studies	<a href="mailto:uvcsdean@uvic.ca">uvcsdean@uvic.ca</a>
Academic unit, department, or school	Miranda Angus, Director of Program and Partnership Development, Division of Continuing Studies	<a href="mailto:mangus@uvic.ca">mangus@uvic.ca</a>
Name, title, and email of contact person	Miranda Angus, Director of Program and Partnership Development, Division of Continuing Studies	<a href="mailto:mangus@uvic.ca">mangus@uvic.ca</a>
Anticipated start date of proposed certificate or diploma <b>*Note – the program must not be advertised/offered until all approvals are finalized.</b>		September 2025

**Please provide dates of all approvals**

Required approvals	Date
Pre-consultation with AVPAP (by contact person and Dean/designate)	In progress
Departmental/School approval	24 Feb 25
Faculty Curriculum Committee approval	24 Feb 25
*Faculty Council approval (or <u>indicate</u> equivalent Faculty voting body)	Senate Committee on Continuing Studies 6 March 25

**Please complete all rows with date or N/A**

Consultations (as applicable must be initiated at least 6 weeks before SCP submission deadline; see notes below) <b>*supporting documentation required for all consultations</b>	Date (or N/A)	Supporting Documentation Attached (Y/N)
Libraries – Jonathan Bengtson, University Librarian <a href="mailto:bengtson@uvic.ca">bengtson@uvic.ca</a>	18 Oct 24	Y
Co-operative Education and Career Services – Andrea Giles, Executive Director – <a href="mailto:cooped@uvic.ca">cooped@uvic.ca</a>	18 Oct 24	Y
Office of the Registrar and Enrolment Management – <a href="mailto:OREGSCPConsultation@uvic.ca">OREGSCPConsultation@uvic.ca</a>	N/A	N
Indigenous Academic and Community Engagement – Kundoqk Jacque Green, Executive Director, <a href="mailto:iaceconsultations@uvic.ca">iaceconsultations@uvic.ca</a> <b>**Please complete the <a href="#">IACE Consultation form</a> and submit with proposal.</b>	21 Oct 24	Y
External and Internal Consultation (letters of support as per section J)	6 March 25	Faculty of Engineering and Computer Science

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**A. Provide a summary of the proposed new certificate or diploma, and clearly articulate how the program aligns with current institutional plans and priorities (maximum 1 page).**

For over 30 years, the Division of Continuing Studies (DCS) has offered non-credit diploma, certificate and micro-credential programs designed to meet the needs of adult learners seeking professional development opportunities to grow or enhance their current professional skillsets. As labour market demands change, DCS seeks to continually update its offerings of core professional development opportunities to ensure alignment with professional opportunities locally, provincially, nationally, and internationally.

The proposed non-credit certificate in Data Analytics (DAC) is designed to provide a comprehensive technical and critical skillset needed to interpret, analyze, and visualize patterns and trends in different data types. The proposed program is designed to provide participants with a comprehensive understanding of data analytics principles and practices and is structured to cater to both novices and professionals seeking to deepen their expertise in data analytics. The curriculum encompasses a breadth of data analytics topics, ensuring that graduates are well-equipped to tackle the complexities of data-driven decision-making in various industries and contribute to the success of their organizations. The proposed DAC program will strongly align with labour demands, preparing graduates to work as data analysts, or lead data-driven decisions in their chosen sector.

The proposed DAC program builds on the success of our existing non-credit micro-credential in Business Intelligence and Data Analytics (BIDA), and the newly launched Diploma in Data Analytics for Management Science (DAMS), allowing learners an option to specialize in fulsome technical data skills than BIDA or without the additional optional complement of management and strategic implementation courses available in the longer DAMS program, or as laddering option between from the micro-credential or diploma programs.

The BIDA micro-credential has proven incredibly popular with learners, and there is a demonstrated need and interest among learners and graduates for a larger credential. Professional learners and graduates from DCS programs are continually seeking additional training in the field of data analytics, driven by the growing demand for data-driven decision-making across various industries. This certificate program will allow us to meet the needs of both current and future learners, and provide an opportunity to engage BIDA graduates interested in a more fulsome program in this discipline.

Launched in 2018, the non-credit, three-course micro-credential in [Business Intelligence and Data Analytics](#) was developed with the guidance and validation of a large professional advisory committee, including representatives from public and private sectors and the Faculty of Engineering and Computer Science. The non-credit 12-course diploma in Data Analytics for Management Science follows the same guidance and validation structure, as will DAC.

The proposed DAC program upholds UVic's commitment to [honour lifelong learning](#) by equipping adult learners with the skills and knowledge they need to achieve their professional goals. This program aligns with UVic's strategic priorities by addressing both local and global labour market challenges through professional skills development. Additionally, it seeks to dismantle systemic barriers to equity and inclusion in education by catering to the diverse needs of adult learners, Indigenous students, and international participants. Through its flexible and accessible offerings, the program ensures that historically underrepresented groups have access to high-quality education and professional development opportunities. Moreover, it responds to the specific training needs of the community and learners, ensuring that educational offerings are both relevant and impactful, strengthening UVic's role as a vital resource for lifelong learning and workforce development.

In summary, the DAC program aligns with UVic's strategic priorities by fostering innovation, preparing students for future work, engaging with the community, and supporting lifelong professional development. It responds to the strong labour market demand for data analytics expertise and supports UVic's commitment to making a meaningful impact in both the local and global economy.

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**B. Curriculum design (include draft curriculum, if applicable, as an appendix) (maximum 2 pages)**

As per University Policy AC1135 for the Establishment of Certificate and Diploma Programs, undergraduate certificate programs should normally consist of a 10.5-15.0 (or non-credit equivalent) unit course credit (7-10 courses). To fully achieve the required learning outcomes, program learners must complete eight (8) courses.

All courses will be 36 instructional hours, equivalent in length to UVic's 1.5 unit term-based courses.

The program will consist of seven required courses and one elective course.

**Program Curriculum**

Seven Required Courses:

1. Business Intelligence and Data Analytics Fundamentals (DAMS 301)
2. Data Analytics Coding Fundamentals (DAMS 302)
3. Data Ethics and Security (DAMS 303)
4. Introduction to Data Storytelling, Data Visualization and Reporting (DAMS 304)
5. Advanced Data Visualization and Reporting (DAMS 404)
6. Data Provisioning, Importing, Extracting, and Manipulation (DAMS 405)
7. Predictive Data Analytics and Modeling (DAMS 406)

Plus one of the following:

1. Machine Learning Fundamentals (DAMS 407)
2. Data Strategy Development (DAMS 410)
3. Final Project in Data Analytics and Management Science (DAMS 490)

To complement the fulsome skillset delivered via the required courses, learners may specialize in advanced machine learning skills, develop strategies for the implementation of data in a business context, or focus on an individual professional project.

See Appendix A for full course details.

As we cater to adult learners, DCS is committed to providing flexible, stackable learning options for professional learners. DAC will serve as a laddering opportunity from the shorter existing BIDA micro-credential into a more comprehensive program, or alternatively, as an off-ramp from the new 12-course [DAMS program](#), following the successful model of the Business Administration [certificate](#), [diploma](#), and [micro-credential](#) laddering options available within DCS.

**C. Indicate the program requirements and design, including core and prerequisite courses. Identify which courses already exist at UVic and any new courses to be implemented as a result of the proposed program.**

- Does the proposed program involve places for integration of teaching and research? If yes, please provide details.
- Does the program include opportunities for experiential learning or other forms of community engagement or research-enriched learning?

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- Does the program design include plans for distance education delivery? If yes, provide details.

All DAC curriculum exists within the existing Business Intelligence and Data Analytics non-credit micro-credential program, or is currently under development for the non-credit diploma in Data Analytics for Management Science program.

Courses within the Division of Continuing Studies are taught by term-based contract instructors with professional, relevant, sector experience. Program instructors are normally required to have a graduate-level degree in related disciplines plus 5+ years of relevant sector experience. This program will leverage the extensive expertise of experienced instructors within DCS to develop and deliver the program curriculum. As a non-credit program, there is no requirement for faculty hires or integration of research for term-based instructors. Course developers are contracted separately by DCS, independent of course instruction. All program curriculum undergoes thorough initial vetting by a curriculum validation committee, with ongoing regular review for relevance conducted by a professional program Advisory Committee. For more details, see Appendix B, Terms of Reference.

Through a blend of theory and hands-on experiential learning, participants will immediately be able to transition classroom education into a professional environment. All core courses will require in-person or virtual lab environments for immediate integration of data into real-world contexts.

The majority of courses will be offered in both online and in-person formats, thus allowing the program to be completed by those who are currently working professionals or live at a distance. Learners will additionally have the option of selecting 12-week term-length courses, or intensive 6-week offerings (6 instructional hours per week). Online asynchronous content will be enhanced by weekly synchronous lectures and activities, multimedia elements and videos, and a professional community of practice among the instructor and participants. Curricular design for both online and in-person offerings will emphasize professional applicability, accessibility, and pedagogy for adult, international, and non-traditional learners. The Online Learning Services team at DCS provides one-on-one instructional design, pedagogical support, and technical knowledge to support all aspects of course development, delivery, and learner experience to support both online and in-person learning experiences for professional adult learners.

**D. Integration of Indigenous perspectives, decolonization, global perspectives, equity, diversity and inclusion (maximum 2 pages)**

- Does the proposed program provide opportunities to include Indigenous perspectives and decolonization? If yes, please provide details.

Indigenous perspectives will be integrated in a variety of ways, largely shaped by available Indigenous contributors. We are in the process of confirming Indigenous representation on our program advisory committee, and we are currently seeking Indigenous practitioners to contribute further via curriculum development, instruction, validation, or guest speaking.

We will work with our colleagues in [library services](#) to source Indigenous business case studies and case studies on how Indigenous communities use data for decision-making and preserving cultural heritage will be prioritized for use in course developments as appropriate, including highlighting the historical context of data collection, its impact on Indigenous communities, and the importance of ethical data practices and Indigenous data sovereignty principles and protocols. The DCS learning services team, which oversees course curriculum, will work with instructors and review content to ensure courses emphasize principles of Indigenous data governance and respect Indigenous data sovereignty.

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Data Ethics and Security (DAMS 303) includes a strong focus on Indigenous Data Sovereignty and delves into the unique challenges and opportunities related to Indigenous data, including the importance of respecting Indigenous knowledge systems, cultural values, and governance structures. Through case studies and practical exercises, students will gain a deep understanding of how to ethically manage data in a way that supports the rights and interests of Indigenous communities.

Instructors are encouraged to participate in Indigenous Cultural Acumen training and address any structural barriers for Indigenous and non-Indigenous learners in the classroom.

Additionally, DCS has bursaries specific to Indigenous learners, creating support to allow more Indigenous learners to pursue careers in data analysis while alleviating some financial pressures.

- Does the proposed program design provide opportunities for global engagement or international perspectives? If yes, please provide details.

Courses incorporate international perspectives, and the study of global data into courses where appropriate to enhance learners' understanding and application of data in a global context. Case studies from various countries will highlight how data analytics is applied in different cultural and economic contexts, the use of datasets from international organizations such as the United Nations, World Bank, and World Health Organization, exposure to international experts in the field of data analytics via guest lectures will contribute to international perspectives in the program.

DCS supports thousands of international learners in both professional and English-language programs annually and has dedicated supports available to meet the unique challenges for international learners studying both in Canada and abroad. We anticipate an international interest in this program (along with the longer DAMS program), and thus their perspectives will also inform the curriculum. Ensuring the curriculum is responsive to their interests and concerns and offers them appropriate skills and knowledge to transfer their learnings to wherever they seek to work, is thus a priority. Curriculum will be supported and enhanced by drawing on examples from diverse parts of the world. Additionally, many current course instructors bring a depth of international professional experiences into the classroom space.

- How does the proposed program promote justice, equity, diversity, and inclusion? If yes, please provide details.

Data Ethics and Security (DAMS 303) is a new core course being developed to explore how data analytics can be used to address issues such as racial disparities, gender inequality, and economic inequities. The curriculum will examine the historical context of data collection and its effects on marginalized communities, emphasizing ethical data practices, the decolonization of data methodologies, and the identification and mitigation of biases in data collection, analysis, and interpretation. Whenever appropriate, case studies and examples of businesses that promote social good and tackle societal inequities will be incorporated.

Both existing and new curricula in the DAMS program will feature guest speakers from diverse backgrounds who will share their experiences and insights. Through the professional community of practice formed in the classroom, participants will have the opportunity to build diverse connections and establish mentorships in the professional field.

**E. Describe the learning outcomes of the proposed program.**

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Upon completion, learners will be able to:

1. Analyze and interpret data by evaluating and synthesizing complex data sets to extract meaningful insights and support data-driven decision-making processes.
2. Apply data analytic techniques by utilizing appropriate methodologies and tools, including coding and statistical analysis, to solve real-world problems.
3. Design and develop data visualizations by creating advanced data visuals and reports that effectively communicate data insights to diverse audiences, enhancing data storytelling capabilities.
4. Implement ethical data practices by examining how data analytics can reinforce biases in systemic social and economic inequities and apply a data ethics lens to how data is interpreted and used in decision-making.
5. Formulate data strategies by developing skills to enable, communicate, and promote data-driven decision-making across an organization.

**F. What are the admission requirements for the proposed program?**

Due to the rigour of the courses and the focus of the integration of course-learning into a professional context, applicants to the certificate should normally be secondary school graduates with at least two (2) years of professional work experience or have previously completed the equivalent of two (2) years of post-secondary study. Mature learners who do not meet these requirements, are welcomed with at least five (5) years of professional experience. Previous experience in data analytics or coding will not be a requirement for entry.

**G. How is the proposed certificate or diploma aligned with, or is distinct from other related programs at UVic and other BC post-secondary institutions?**

While data analytics and/or data science programs do exist, this program is distinct in several ways:

- This non-credit program is designed for two primary audiences: 1) professional learners, not seeking university credit, but instead seeking professional re-skilling/up-skilling, and 2) international learners and newcomers to Canada, also not seeking undergraduate credit, but looking to pair their previous educational and professional experience with a short (relative to undergraduate degree), high-demand, professional education program.
- The majority of existing programs are credit programs offered at an undergraduate or graduate degree-level, or alternatively, on a course-by-course basis.
  - Both undergraduate and graduate-level programs have strict entry requirements and deadlines.
  - Undergraduate programs require an ongoing period of study and time-commitment, and financial commitment unsuitable to professional learners (who likely already have at least an undergraduate degree).
  - Individual courses provide only an abridged introduction to the field of data analytics.
- The emphasis on the use of data access and integration in a business context opens program interest across multiple sectors and does not require the technical background necessary for data science credentials.
- The integration of the curriculum in DAMS 303 focusing on ethics and Indigenous data sovereignty will be unique within programs in British Columbia.



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- Curriculum and assessment design emphasize immediate applicability into participants' workplace and prepare learners to integrate their classroom knowledge into professional practice immediately.
- Instructors are industry experts who will lead a community of professional practice in the classroom, emphasizing professional connections and networks for participants. Expected interest from DCS's current professional domestic learners, Indigenous learners, and international learners will create an opportunity for cross-cultural and cross-sector discussions, groupwork, and collaborations.
- Curriculum will be offered both online and face-to-face, term-length and intensive, providing multiple options for both professional and international learners.

See Appendix C for a list of comparable programs.

**H. Describe the enrolment plan for the length of the program (e.g., anticipated number of students in the program at launch and steady state for the expected duration of the program).**

Our existing BIDA micro-certificate is well-subscribed, and graduates regularly express a desire for more training in this growing field. The new DAMS program is now open for application and will launch in September, 2025 and interest over the initial weeks of application is strong.

Based on current inquiries from potential new learners, graduates of BIDA, and recruitment partners, we expect 75-100 new certificate applicants annually.

See below for existing enrollment numbers of core courses to be integrated into the program:

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25
BIDA 301 (will become DAMS 301)	42	94	189	123	197	130
BIDA 302 (will become DAMS 302)	42	47	74	121	91	102
BIDA 404 (will become DAMS 404)	16	26	24	44	56	28
BIDA 405 (will become DAMS 405)		15	24	21	27	15
BIDA 406 (will become DAMS 406)		7	24	27	16	19
BIDA 407 (will become DAMS 407)					23	N/A
<b>TOTAL Registrations</b>	<b>100</b>	<b>189</b>	<b>335</b>	<b>336</b>	<b>410</b>	<b>294</b>

**I. What is the evidence of demand for the proposed program, including labour market indicators?**

In 2024, evidence overwhelmingly highlights the growing demand for data analysis skills across nearly every industry. By expanding the existing micro-credential and professional development offerings in data analysis, this

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certificate will deliver a skillset soon to be expected to almost every professional role both within Canada and abroad.

The skills developed in DAC indicate a broad audience of not only those seeking to enter the data analysis field, but also those working in administrative, financial, healthcare, retail, logistics or educational fields, seeking to develop important training in this highly-sought-after skillset necessary for advancement in most industries in the future. Current and emerging leaders and managers must understand and utilize data effectively to succeed in their roles moving forward.

Harvard's 2023 report, [Ready for Anything](#), identifies a lack of "tech-savviness" and data knowledge as the challenge for leaders moving forward. Similarly, an in-depth case study of the UK construction industry, the 2021 report, [Digital Literacy in the UK](#), identifies the shortage of digital literacy among leaders and managers, specifically the inability to use, clean, and identify trust in data.

In the [Future of Jobs Report 2023](#), the World Economic Forum notes that 80% of companies planned to adopt data analytics over a five-year period (2023-27) and that data analytics is expected to be one of the biggest drivers of job growth during this same time period. The same report notes "a 30-35% increase...in demand for roles such as Data Analysts and Scientists, Big Data Specialists, Business Intelligence Analysts... that is driven by advances and growth in adoption of frontier technologies which rely on big data. This expectation of growth in these roles is common across countries..."

In a 2023 report: [Digital Skills for Today and Tomorrow](#), the Conference Board of Canada cited a critical need for data analysis skills. In a December, 2022 news release, [ADASTRA](#) noted that "companies that are not moving quickly enough to align their data and analytics with their business strategy risk falling even further behind their competition as employment needs go unfulfilled in the marketplace". And general analytics skills annually place within the top ten [in-demand skills noted on LinkedIn](#).

[Lightcast](#) labour market data analytics from January 2021 - September 2024 notes 22,207 unique job postings in British Columbia requiring a skillset in data analytics. Postings include an average salary of \$89,500 across the province. Top occupations requiring this skillset include health fields (registered nurses), professional occupations in advertising, marketing and public relations; business management consulting; financial and investment analysts; administrative officers; urban and land use professionals, and human resource professionals. See Appendix F for full report.

We currently have 201 in-progress learners in the BIDA micro-credential, and 176 micro-credential graduates who we can promote the new program to.

**J. Indicate resource requirements, including existing and new faculty and staff appointments, space, and library requirements (include a table of program revenue and expenditures).**

No resources required. This program will be fully supported within the existing structure of Continuing Studies.

**K. Show evidence of consultation with and/or support of related UVic academic units/programs and other BC post-secondary institutions, relevant regulatory or professional bodies (provide copies of letters of support in an appendix).**

See Appendix E for evidence of consultation and support. Please note that internal non-academic consultations reviewed the longer Data Analytics for Management Science diploma program, as all curriculum and resources for this proposed certificate program would be embedded within that larger program.

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**Appendix A Course Details**

Required Courses:

1. **Business Intelligence and Data Analytics Fundamentals (DAMS 301):** Explores foundational frameworks to understand, use and evaluate a variety of techniques and skills in analyzing data sets and making appropriate interpretations of the data.
2. **Data Analytics Coding Fundamentals (DAMS 302):** Explores the fundamentals of coding and scripting for data analytics. Participants will develop the ability to script and code for basic tasks in data analytics in common data analytic tools such as R, Python and Excel to import and export data appropriately, perform fundamental data manipulations, and automate basic analysis elements.
3. **Data Ethics and Security (DAMS 303):** Explores the ethical and security considerations in data management, with a special emphasis on Indigenous Data Sovereignty. Students will learn about the principles of data ethics, privacy, and security, and how these apply to the collection, storage, and use of data. The course will delve into the unique challenges and opportunities related to Indigenous data, including the importance of respecting Indigenous knowledge systems, cultural values, and governance structures. Through case studies and practical exercises, students will gain a deep understanding of how to ethically manage data in a way that supports the rights and interests of Indigenous communities.
4. **Introduction to Data Storytelling, Visualization and Reporting (DAMS 304):** Learn how to effectively communicate data results, evaluate strengths and weaknesses of various data communication and visualization techniques, and explore the fundamentals of dashboard design for various types of reporting.
5. **Advanced Data Visualization and Reporting (DAMS 404):** Focusses on advanced techniques for visualizing and reporting data to support business decision-making. Participants will learn how to create compelling visual narratives and data storytelling using various tools and technologies. The course covers best practices in data visualization, dashboard design, and interactive reporting.
6. **Data Provisioning, Importing, Extracting, and Manipulation (DAMS 405):** Building off Data Analytics and Coding Fundamentals, participants will develop advanced skills in data provisioning and manipulation and construct scripts to solve problems and apply safeguards to data for privacy and security in a data analytics framework.
7. **Predictive Data Analytics and Modeling (DAMS 406):** Using standard industry-accepted informatics tools, participants will design and create descriptive, diagnostic and predictive models and learn how to translate stakeholder needs into model designs and understand the ethical implications of the analytical models you use.

Select one of:

1. **Data Strategy Development (DAMS 410):** Focuses on the development of effective data strategies to drive business success. Students will learn how to align data initiatives with organizational goals, create data governance frameworks, and implement best practices for data management. The course covers strategic planning, data lifecycle management, and the role of data in decision-making processes. Through practical exercises and case studies, students will gain the skills needed to design and execute data strategies that enhance business performance and innovation.
2. **Final Project in Data Analytics and Management Science (DAMS 490):** Application of knowledge and skills acquired through diploma program via a comprehensive final project. Participants will work on real-world analytics and management science problems, integrating techniques from data sourcing, analysis, visualization, as well as ethical concerns, while emphasizing practical applications, critical thinking, and strategic decision-making.
3. **Machine Learning Fundamentals (DAMS 407):** Develops fundamental concepts and components of machine learning (ML) such as Python programming, regression, classification and clustering, and essential tools, such as modern data visualization, and skills to fully understand the field of ML.

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## **Appendix B Draft Program Advisory Terms of Reference**

The DCS Data and Technology Programming Advisory Committee (DTAC) provides strategic guidance in the research and development of multi-sectoral, innovative data and technology-related course and programming opportunities in the Division of Continuing Studies. The TPAC provides advice on ways of responding to changing industry needs, specific challenges, and new opportunities.

The TPAC plays an important role in ensuring the integrity and quality of programming at the Division of Continuing Studies and, as such, makes recommendations to the Chair on matters relating to academic and programmatic issues pertaining to technology programming.

### **Committee Membership**

Members will be recommended by the Committee and/or associated partners and appointed by the Chair. Members will represent a combination of administrative, academic, and external partners, in order to provide a broad representation of technology-sector needs. The Committee is comprised of the following representatives:

- Director, Business, Science and Technology Programs, Continuing Studies will serve as Chair (standing member)
- Program Coordinator(s), Business, Science and Technology Programs, Continuing Studies (standing member)
- One - two representatives from Information Technology, Continuing Studies
- One Faculty of Engineering and Computer Science representative, University of Victoria
- One Instructor, Continuing Studies
- One current student representative
- One program alumni representative (when available)
- Up to four members external to the University of Victoria, serving as broad-range of data, business, and/or technology-sector representatives including, but not limited to: IT, government, private, or health care sectors
- One public sector representative

### **Terms of Membership**

- Unless noted as a standing member, members will serve 2-year terms (the terms will be staggered to allow for continuity), with the potential for renewal
- Members will attend at least one meeting per year

### **Committee Responsibilities**

Committee members are expected to:

- Provide knowledgeable input and guidance throughout a process of innovative idea generation. This may include providing information about the trends and needs in the sector, contributing informed recommendations for new course and program development, input to new course and program level learning outcomes, advice on potential new markets and possible partnership opportunities, and identification of new instructors or industry experts, as appropriate;
- Act as an advocate for DCS programming by identifying individuals and related organizations locally and nationally who might assist with overall promotion or funding opportunities;

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- Review administrative reports pertaining to programming including proposals, reports, marketing plans, surveys, or evaluations.

**Committee Meetings**

Format: Round table discussion

Agenda: A call for agenda items will be distributed one week prior to the meeting. An agenda and background information will be distributed to members by email no later than two days before the meeting.

Frequency and timing: A meeting will be called by the Chair approximately 2 times per year (late Fall and late spring)

Duration: Up to two hours, depending on agenda.

**Amendments**

The terms of reference shall be reviewed annually and modified as appropriate to meet the current needs of technology programming at the Division of Continuing Studies, in consultation with the TPAC Advisory Committee members.

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**Appendix C Comparable Programs**

<b>Institution</b>	BCIT	Douglas College	Langara	SAIT	UCalgary	UFV
<b>Program Name</b>	<a href="#">Applied Data Analytics</a>	<a href="#">Data Analytics</a>	<a href="#">Data Analytics</a>	<a href="#">Data Analytics</a>	<a href="#">Business Intelligence and Analytics</a>	<a href="#">Data Analysis</a>
<b>Program Type (MC, Cert, Dipl, Course)</b>	Certificate	Post-Degree Diploma	Post-Degree Certificate or Diploma	Certificate	Professional Certificate	Post-Degree Certificate
<b>Total Number of Courses</b>	15-18 courses	10	9 or 15	8	8	11
<b>Delivery Mode</b>	Blended	F2F	F2F	F2F, blended, online	Blended	F2F
<b>Admission Requirements</b>	Secondary school graduation or equivalent	Undergraduate degree	Undergraduate degree Minimum 60% in a post-secondary level mathematics or calculus course Competitive admission	Post-secondary degree or diploma from a recognized university, institute, or college	Secondary school graduation or equivalent	Undergraduate degree
<b>Program Delivery (Full-Time, Part-Time)</b>	Part-Time	Part-Time, Full-Time	Part-Time, Full-Time	Part-Time, Full-Time	Part-Time, Full-Time	Full-Time
<b>Program Length</b>	Up to 5 years	1 year	4 terms	Minimum 30 weeks	10-18 months	10-18 months

Appendix D Lightcast Job Posting Analytics January, 2021 – December, 2024: Specialized Skill (Data Analysis, all careers)

## Job Posting Analytics

Lightcast Q3 2024 Data Set

February 2025

## Job Postings Overview

31,982

Unique Postings

72,453 Total Postings

3,691

Employers Competing

57,594 Total Employers

2 : 1

Posting Intensity

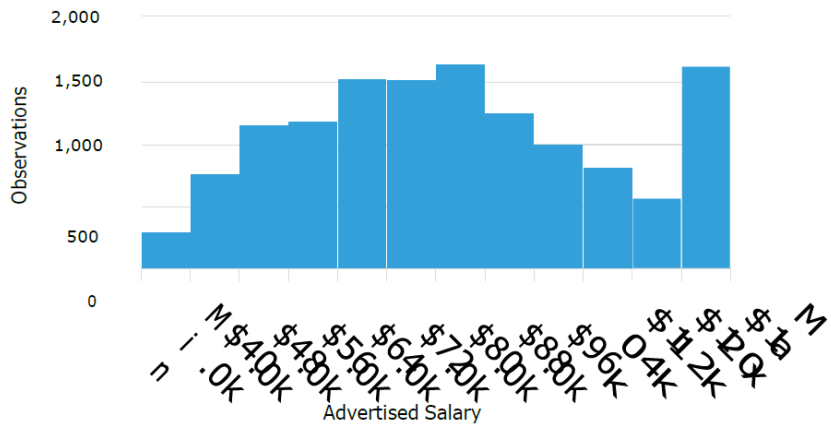
Regional Average: 2 : 1

## Advertised Salary

There are **13,260** advertised salary observations (41% of the 31,982 matching postings).

\$80.8K

Median Advertised Salary































## Advertised Salary Trend

▲ 13.5% Jan 2021 – Dec 2024  
\$80.8k Median




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## Top Posted Occupations

	Total/Unique (Jan 2021 - Dec 2024)	Posting Intensity	Unique Postings Trend (Jan 2021 - Dec 2024)
Database analysts and data administrators	5,286 / 2,447	2 : 1 	
Professional occupations in advertising, marketing and public relations	4,929 / 2,405	2 : 1 	
Professional occupations in business management consulting	3,181 / 1,213	3 : 1 	
Financial and investment analysts	1,847 / 887	2 : 1 	
Data scientists	1,808 / 857	2 : 1 	
Administrative officers	1,838 / 813	2 : 1 	
Information systems specialists	2,153 / 772	3 : 1 	
Human resources professionals	1,467 / 680	2 : 1 	
Urban and land use planners	1,323 / 620	2 : 1 	
Financial managers	1,244 / 559	2 : 1 	
Biologists and related scientists	947 / 470	2 : 1 	
Mathematicians, statisticians and actuaries	1,058 / 453	2 : 1 	
Other professional occupations in social science	1,036 / 448	2 : 1 	

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Software developers and programmers	822 / 434	2 : 1		
Sales and account representatives - wholesale trade (non-technical)	902 / 429	2 : 1		
Financial auditors and accountants	1,184 / 414	3 : 1		
Production logistics workers	834 / 405	2 : 1		
Corporate sales managers	855 / 400	2 : 1		
Human resources managers	927 / 391	2 : 1		
Pharmacists	1,052 / 365	3		

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**Appendix E Evidence of Consultation and Support**



**Faculty of Engineering and Computer Science**  
**Office of Professional Programs and Development**

University of Victoria	PO Box 1700 STN CSC	Tel (250) 721-8677
Engineering Office Wing	Victoria, British Columbia	Fax (250) 721 8676
RM 248	V8W 2Y2 Canada	<a href="http://www.uvic.ca/ecs">www.uvic.ca/ecs</a>

6 March, 2025

Miranda Angus, Director  
Division of Continuing Studies  
University of Victoria

**Re: Non-Credit Certificate Program on Data Analytics (DAC)**

Dear Miranda,

Thank you for consulting with me on your proposal to create a new non-credit certificate program on Data Analytics (DAC) in the Division of Continuing Studies (DCS). The DCS has recently launched a Diploma in Data Analytics for Management Science (DAMS), which leverages and combines elements from the existing diploma program in business administration (DBA) (offered since 1989) and the micro-credential in Business Intelligence and Data Analytics (BIDA) (since 2018). The proposed DAC certificate packages a subset of the DAMS diploma that will appeal to learners interested in focusing on the technical data analytics skills without the additional content on management and strategic implementation. Adding the DAC certificate to the DCS portfolio of programs is a further step towards the creation of flexible pathways and diverse opportunities for community members to acquire topical knowledge and skills outside of a for-credit university program.

While the Faculty of Engineering and Computer Science (FCS) has educational offerings covering some of the topics taught in the DAC and DAMS programs (data science and data analytics), the proposed program is significantly different and will provide a welcomed addition to the University's menu of options for learners interested in these essential areas of demand.

The program curriculum appears well-balanced between the seven required courses and an attractive set of electives. The inclusion of an ethics and security course is an essential aspect of this program. I appreciate that the program provides learners who have completed micro-certificates with the opportunity to ladder into this certificate program and possibly further into the full DAMS diploma program.

I fully support the proposal for the DAC program going forward and expect that it will be popular and impactful.

Sincerely,

A handwritten signature in blue ink, appearing to read "J. Weber".

Dr. Jens Weber  
Associate Dean, Professional Programs and Development  
Faculty of Engineering and Computer Science  
University of Victoria

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## University of Victoria Libraries

**Jessica Mussell, Distance Learning and Research Librarian**

Subject areas: nursing, health information science, social work, child and youth care,  
continuing studies

PO Box 1800 STN CSC | Victoria, BC V8W 3H5 Canada  
Telephone: 250-472-5090  
Email: [jmussell@uvic.ca](mailto:jmussell@uvic.ca)

**DATE:** October 21, 2024

**TO:** Miranda Angus  
Director, Program and Partnership Development  
Division of Continuing Studies, University of Victoria

**FROM:** Jessica Mussell, Librarian

**RE:** Library comments on the Data Analytics and Management Science (DAMS) diploma  
program proposal

Thank you for the opportunity to review the proposed diploma in Data Analytics and  
Management Science for the Division of Continuing Studies.

As the majority of the curriculum for this proposed program already exists through the Business  
Intelligence and Data Analytics (BIDA) micro-credential and the diploma and certificate in  
Business Administration (CBA/DBA), I foresee no library implications.

Please let me know if you have any questions about this, or if there is any other information  
which I can provide.

Regards,  
Jessica

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**From:** [Andrea Giles](#)  
**To:** [Miranda Angus](#)  
**Subject:** RE: Continuing Studies proposal for feedback?  
**Date:** October 18, 2024 2:23:24 PM  
**Attachments:** [AG For Distribution DAMS standard-template-for-new-certificate-or-diploma-undergrad.docx](#),  
[Digital Literacy in the UK THE Consultancy Report.pdf](#),  
[image001.jpg](#),  
[Report Ready-for-Anything Jun2023.pdf](#),  
[CRE4069 CL RA23 Infographic-3 3.pdf](#)

---

Thanks, Miranda, for sharing this with me. Very interesting – I was reading it with two lens: 1. With my SCP cap on; and 2. Specifically focussing on Labour Market research.

I found a few typos etc. in the document so I highlighted these with review mark-up notes.

On the labour market front – I think you're right on. I had pulled out my reference material to see if I had anything to add – and most of what you referenced is what I had thought of too. But there were a couple of articles that I thought I'd share with you:

1. Digital Literacy in the UK – THE Consultancy Report (from 2021) – maybe a little old but it highlights some nice stats with a global lens.
2. Ready for Anything (also with its accompanying Infographic) (from 2024) – this is from Harvard and is from the perspective of leadership development. It does highlight “building the tech-savviness of all leaders”. I thought you might want to also mention (maybe a bit more directly than obliquely) these types of learners – the leaders also need these skills and could be your client market, too.....

I don't feel I have too much to add as – on the Labour Market side – I think you highlighted relevant points.

I hope this helps!

Andrea



Andrea Giles, M.A.  
Executive Director  
Co-operative Education Program and Career Services

[University of Victoria](#)  
Jamie Cassels Centre (JCC), Room B271n  
PO Box 1700 STN CSC  
Victoria, BC V8W 2Y2 Canada  
T 250-721-6211 or 250-721-7628 F 250-721-8996  
Web: [uvic.ca/coopandcareer](http://uvic.ca/coopandcareer) | Portal: [learninginmotion.uvic.ca](http://learninginmotion.uvic.ca)

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**From:** Miranda Angus <mangus@uvic.ca>  
**Sent:** October 18, 2024 12:47 PM

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**Office of Indigenous Academic and Community Engagement (IACE)**  
**Consultations for Program Proposals**

The Office of Indigenous Academic and Community Engagement (IACE) engages with academic units across the institution to support Indigenous student success and community engagement grounded in cultural teachings from Elder's Voices. One significant part of IACE's mandate is to offer academic leadership and support for the advancement of Indigenous academic programming, guiding the university in processes and projects of decolonization and reconciliation. As a result, IACE reviews proposals for new academic programs and for revision or discontinuance of existing academic programs as part of the wider process overseen by the Associate Vice-President Academic Programs in the Office of the Vice-President Academic and Provost.

As this is a complicated process, academic units working on program proposals are encouraged to submit this form as soon as is practicable, to ensure a timely engagement with IACE. If IACE view is required for the proposal, this will take at least six weeks once the unit has a complete draft of the proposal, and consultation with IACE will add to this time.

**Part I: Background Information**

Department/School/Faculty: Division of Continuing Studies

Name of Program: Diploma in Data Analytics and Management Science (non-credit)

Credential Level:

☒ Diploma/Certificate   ☐ Undergraduate   ☐ Master's   ☐ Doctoral

Type of Proposal:

☐ New Degree   ☒ New Program   ☐ Revision of Program   ☐ Discontinuance of Program

**Part II: Overview/Summary**

Description/scope of proposal (approximately 200 words)

New non-credit, 12 course professional diploma program for professional re-skilling-up-skilling purposes.

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Rationale for the proposal (approximately 200 words)

The collection, analysis, and interpretation of data has become a critical business function and now plays a key role in shaping nearly every business decision. The proposed **non-credit** diploma in Data Analytics and Management Science (DAMS) is designed to provide a comprehensive skillset of technical foundations and specialized skills needed to analyze patterns and trends in different data types to lead, present data, and make informed business decisions. Participants will identify and evaluate data sources to assist in building innovative business strategies.

The proposed diploma in Data Analytics and Management Science (DAMS) builds on the success of our existing non-credit programs. Meeting strong labour market demands, this program will prepare graduates to work as data analysts, but will also be relevant to audiences from any sector to lead data-driven decisions within their current role.

For program revisions or discontinuances, how many Indigenous students are currently enrolled?

N/A

For new programs, how many Indigenous students do you envision enrolling?

8-12 annually

**Part III: Proposal Information**

A. Does this proposal include elements that will focus on:

- Attracting or retaining Indigenous students? ☐ Yes ☒ No  
Please provide details (approximately 100 words)

Not specifically noted

While we hope to engage interest from Indigenous professionals in the program, it is not a specific element of focus in the proposal.

- Engaging with Indigenous communities, nations, or organizations? ☐ Yes ☒ No  
Please provide details (approximately 100 words)
- Attracting or retaining Indigenous faculty? ☐ Yes ☒ No  
Please provide details (approximately 100 words)

This is a no-credit program, no faculty requirements.

- Engaging with Indigenous knowledge(s) and/or ways of knowing and being? ☐ Yes ☒ No  
Please provide details (approximately 100 words)
- Engaging with Indigenous territories, lands and/or waters? ☐ Yes ☒ No  
Please provide details (approximately 100 words)



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- B. Does the proposed program envision drawing on IACE resources (e.g., assistance with booking Elders, etc.)?

☐ Yes ☒ No

- C. How does the proposed or revised program support or advance institutional priorities and plans related to Indigenous initiatives (e.g., Indigenous Plan, Strategic Plan, etc.)? Please identify specific goals and priorities (approximately 200 words).

The proposed program will advanced intuitional priorities noted in the UVic Indigenous Plan by:

1. Prioritizing the creation of a safe learning space for all learners to create an inclusive community of practice
2. Open access by creating a non-credit diploma to allow flexible entry points, and prorgam admission.
3. Integrating and highlighting the historical context of data collection, its impact on Indigenous communities, and the importance of ethical data practices and Indigenous data sovereignty principles and protocols within program curriculum.

**Part IV: Consultation and Approvals**

If you answered “No” to all questions in Part III A, no further consultation with IACE is required and this signed document can be included in the proposal as evidence of consultation with IACE.



---

Dr. Rob Hancock  
Associate Director  
Office of Indigenous Academic and  
Community Engagement

22-OCT-24

---

Date

If you answered “Yes” to question B in Part III, you will also need to arrange for a letter of support from IACE outlining the contributions in addition to this signed form.

☐ IACE letter of support included in final proposal

IACE Comments (approximately 200 words)



University  
of Victoria

**SUBMISSION TO THE UVIC BOARD OF GOVERNORS**

**Date:** May 12, 2025

**To:** Operations and Facilities Committee

**For:** Information

**From:** Kristi Simpson, Vice-President Finance and Operations

A handwritten signature in black ink, appearing to read 'K. Simpson'.

**cc:** President and Vice-Chancellor

**Meeting Date:** May 27, 2025

**Subject:** Status Report on Capital Projects

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**Background:**

Attached please find the regular Board reports on the status of the National Centre for Indigenous Law, District Energy Plant Electrification, and the Engineering Expansion projects.

**Previous Consultation:**

Report provided to Board of Governors Operations and Facilities Committee at each meeting.

**Basis for Jurisdiction:** Committee's Terms of Reference

**Attachment(s):**

VPFO/FMGT Project Updates: February 28, 2025

1. National Centre for Indigenous Law
2. Engineering Expansion
3. District Energy Plant Electrification Project

# PROJECT STATUS REPORT

## EXECUTIVE SUMMARY

19-04343 – NATIONAL CENTRE FOR INDIGENOUS LAWS (NCIL)

**DATE:** April 23, 2025

**REPORTING PERIOD:** March/April 2025

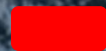
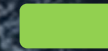
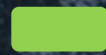
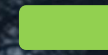
CURRENT MONTH

PREVIOUS MONTH

BUDGET

SCHEDULE

SCOPE



## SCOPE

The National Centre for Indigenous Laws (NCIL) project consists of a 2,440 m2 expansion to the Fraser Building, home of UVic's Faculty of Law. The new space will provide additional teaching classrooms, research and collaboration areas, wellness offices, and study spaces to support the Canadian Common Law and Indigenous Legal Orders Program (JD/JID). This program is the first of its kind in Canada.

SCHEDULE

PRE-DESIGN

DESIGN

CONSTRUCTION\*

OPERATION

Actual /  
Forecast

April  
2020

January  
2023

November  
2022

August  
2025

BUDGET

APPROVED BUDGET

FORECAST

VARIANCE

\$45.90

\$45.90

\$0.00

MAJOR RISKS

- **SCHEDULE** – The re-baselined project schedule was accepted by the NCIL Steering Committee in March. The Construction Manager is reporting construction completion in Summer 2025 with occupant move-in planned for August 2025. There is no impact anticipated to Fall 2025 academic programming.
- **BUDGET** – The NCIL project is in the final phase of construction. Financial risk continues to be monitored closely.

UPDATES

- Interior finishes continue to progress through all areas of the building.
- Exterior landscape work continues to progress from the South end of site.
- Mechanical equipment installation continues at the NCIL Heat Plant.

\* Construction site mobilization

\*\* Pre-Design and Design milestone dates are based on milestone completion

\*\*\* All costs are in Millions









# PROJECT STATUS REPORT

## EXECUTIVE SUMMARY

19-04057 – Engineering Expansion (EE)

**DATE:** April 23, 2025

**REPORTING PERIOD:** March/April 2025

	BUDGET	SCHEDULE	SCOPE
CURRENT			
PREVIOUS			

## SCOPE

The Engineering Expansion project was created to fill the need for teaching, research and office space for the Faculty of Computer Science and Engineering. In particular, current Civil Engineering program spaces are housed in temporary facilities spread around the UVic campus. Accreditation of both Civil and Biomedical Engineering is contingent on program space (teaching, research, support) to be delivered by the Engineering Expansion project's two buildings.

### SCHEDULE

	PRE-DESIGN	DESIGN	CONSTRUCTION*	OPERATION
Actual / Forecast	June 2020	March 2022	January 2024	September 2026

### BUDGET

APPROVED BUDGET	FORECAST	VARIANCE
\$149.76	\$149.76	\$0.00

### MAJOR RISKS

- **SCOPE** –Tender values have not resulted in changes to scope.
- **SCHEDULE** – Risk: Schedule delay impacts ability to complete the two buildings for Sept 2026 term. Mitigation: early order of long lead time items, nighttime or weekend work where necessary, high level coordination of finishing work, commissioning, furniture and equipment moves. Prioritizing labour force toward completion of ECSE for Sept. 2026 term. Bird Construction has advised that HBRSL completion date needs to move to end Sept. 2026 (means opening Jan 2027 term).
- **BUDGET** –TP4D Landscape works came in over the estimated value. VE measures final review underway. Project still on budget. Potential tariffs CAN/US being monitored.

### UPDATES

- Tender Packages (TP): Even with the overage on tendered Landscape works, some VE measures will be implemented and the project remains on budget. Final award pending.
- Site Works underway: ECSE site: Steel erection complete, Cross Laminated Timber (CLT) roof installation underway. HBRSL site: Concrete foundation pours underway, underslab vapour barrier installed. Strong Floor preparation underway.

\* Construction site mobilization

\*\* Pre-Design and Design milestone dates are based on milestone completion

\*\*\* All costs are in Millions



# PROJECT STATUS REPORT

## EXECUTIVE SUMMARY

23-05868 – District Energy Plan (DEP) Electrification Project

DATE: April 23, 2025

REPORTING PERIOD: March/April 2025

	BUDGET	SCHEDULE	SCOPE
CURRENT	<div></div>	<div></div>	<div></div>
PREVIOUS	<div></div>	<div></div>	<div></div>

## SCOPE

The District Energy Plant (DEP) Electrification Project adds two new electric boilers to support achievement of UVic's Climate & Sustainability Action Plan 2030 targets.

### SCHEDULE

	PRE-DESIGN	DESIGN	CONSTRUCTION*	OPERATION
Actual / Forecast	January 2023	February 2025	April 2025	June 2027

### BUDGET

APPROVED BUDGET	FORECAST	VARIANCE
\$12.1M	\$12.1M	\$0M

### MAJOR RISKS

- **SCHEDULE** – Risk: Transformer delivery delay resulting in loss of BC Hydro funding. Mitigation: Expedite submittal review and ordering of transformer.
- **BUDGET** – Risk: Lack of cost certainty. Mitigation: CM hired to provide actual construction costs.

### UPDATES

1. Notice of Intent: Issued to publicly notify the construction industry to directly award revised scope of work to Aral Construction. No challenges to NOI from industry.
2. Project operation start-up date: June 2027
3. DEP Building Expansion: The new electric boilers will be installed in an ancillary building next to the DEP main building. This option reduces risk while retaining redundancy and this decision was validated through extensive review including experts internal and external to the university.

\* Construction site mobilization

\*\* Pre-Design and Design milestone dates are based on milestone completion

\*\*\* All costs are in Millions



University  
of Victoria

BOG-May27/25-21

## SUBMISSION TO THE UVIC BOARD OF GOVERNORS

**Date:** May 12, 2025

**To:** Operations and Facilities Committee

**For:** Decision

**From:** Kristi Simpson, Vice President Finance and Operations

**cc:** President and Vice-Chancellor

**Meeting Date:** May 27, 2025

**Subject:** Fighting Against Forced Labour and Child Labour in Supply Chains Act  
(formerly Bill C-211)

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### Recommendation:

*THAT the Operations and Facilities Committee recommend to the Board of Governors that the Board of Governors approve the University of Victoria Forced Labour and Child Labour Statement for the Fiscal Year ended March 31st, 2025, for submission to the federal government.*

### Background:

Attached is the University of Victoria's report under the Fighting Against Forced Labour and Child Labour in Supply Chains Act (formally Bill S-211).

An annual questionnaire and report is required to identify key components of the university's steps, activities, and programs to ensure measures are in place to prevent and reduce the risk that forced labour is used in our supply chains.

*The act states that:*

“Effective January 1, 2024, entities must, on or before May 31 of each year, submit a report to the Minister of Public Safety on:

- The steps the entity has taken during its previous financial year to prevent and reduce the risk that forced labour or child labour is used at any step of the production of goods in Canada or elsewhere by the entity or of goods imported into Canada by the entity
- Its structure, activities and supply chains
- Its policies and due diligence processes in relation to forced labour and child labour
- The parts of its business and supply chains that carry a risk of forced labour or child labour being used and the steps it has taken to assess and manage that risk
- Any measures taken to remediate any forced labour or child labour
- Any measures taken to remediate the loss of income to the most vulnerable families that results from any measure taken to eliminate the use of forced labour or child labour in its activities and supply chains
- The training provided to employees on forced labour and child labour
- How the entity assesses its effectiveness in ensuring that forced labour and child labour are not being used in its business and supply chains.”

The university has made good progress over the last three years and will continue to engage in assessments with our suppliers, promote and encourage EcoVadis assessments to continue our monitoring of the rankings and integrate awareness and training into the academic, research and administrative faculties and schools.

The legislation requires that these reports be approved by the Board of Governors. For the next reporting cycle we will explore whether this approval can be delegated with significant issues reported to the Board, if there are any. Its submission could then be reported as part of our annual compliance report to the Board (Due Diligence Report – Financial Services).

**Attachment(s):** University of Victoria Forced Labour and Child Labour Statement for the Fiscal Year ended March 31<sup>st</sup>, 2025.

## **University of Victoria Forced Labour and Child Labour Statement for the Fiscal Year ended March 31<sup>st</sup>, 2025.**

This statement is made pursuant to Bill S-211, An Act to enact the Fighting Against Forced Labour and Child Labour in Supply Chains Act and to amend the Customs Tariff. This statement outlines the approach and initiatives by the University of Victoria (UVic) to identify and address the risks of forced labour and child labour in its business operations and supply chains during the fiscal year commencing April 1<sup>st</sup>, 2024, and ending March 31<sup>st</sup>, 2025.

UVic is committed to upholding the values of equity, diversity, inclusion and [human rights](#) in our living, learning and work environments. We are working to create a healthier and more resilient future that upholds the well-being of our region and of all life on our planet. We advance local and global issues like climate action and sustainability, social justice and equity, and health and wellness. We embrace and are guided by the UN Sustainable Development Goals.

### **UVic structure, activities, and supply chains**

UVic is a comprehensive research university located in Victoria, British Columbia. It received degree-granting status in 1963. It was established under the authority of the [University Act](#) and is governed by a [Board of Governors](#) and a [Senate](#).

In accordance with the University Act, the Board of Governors is responsible for the management, administration and control of the property, revenue, business, and affairs of the university. This fifteen-member body consists of the chancellor, the president, two elected faculty members, one elected staff member, two students elected from the university's undergraduate or graduate student societies, and eight members appointed by the Lieutenant Governor in Council.

The campus community comprises 22,000 students, 900 faculty, and thousands of professional staff. UVic is a hub of academic excellence, research innovation, and community engagement. Its activities span a diverse array of disciplines, from sciences to humanities, attracting students and scholars from around the globe. Academic core values are:

- Academic excellence and quality
- Ethical, intellectual, and scholarly integrity
- Academic freedom and freedom of inquiry
- Equity, diversity, inclusion, and belonging

Research at UVic contributes to global knowledge and addresses pressing societal challenges. UVic is uniquely positioned to make a difference in five research impact areas:

- Climate, environmental change, and sustainability
- Health and wellness
- Indigenous-led scholarship
- Social justice and equity
- Technology and the human experience



With a commitment to sustainability and social responsibility, UVic actively participates in community outreach programs, promoting environmental stewardship and cultural understanding.

Our [Strategic Plan](#) outlines UVic's vision, values, and priorities. It inspires our excellence in research, creative activity, teaching, service, commitment to diversity and inclusion, and engagement to serve students, communities, and the world. Our [university plans](#) guide the operational directions for a wide range of UVic activities.

### **UVic Supply Chain**

Procurement at UVic supports academic, research, and administration activities through a centralised Purchasing Services department. Bookstore purchases of materials for resale are managed separately. Supply chains are diverse, from educational materials and laboratory equipment to construction and maintenance services.

Total payments for goods and services, according to UVic's 2023/24 Statement of Financial Information, were close to \$310M. In fiscal year 2024/25 we imported approximately \$6.03 M in goods and equipment, mostly for research projects.

### **Risks of forced labour and child labour in UVic's supply chains**

Based on the [Modern Slavery Index](#), most countries of origin for the majority of UVic imports are considered to have the lowest prevalence of modern slavery, with strong governance and strong government responses to modern slavery. Additionally, some UVic suppliers in high-risk categories such as IT hardware, research equipment, and lab consumables have established anti-slavery policies and practices. The bookstore has identified potential risks of forced and child labour in goods manufactured offshore.

Given the complexity of the university's supply chains, and the limited resources available to effectively monitor supplier performance, UVic has engaged [EcoVadis](#), the world's largest provider of business sustainability ratings. EcoVadis conducts individual sustainability performance assessments of our supply chain partners based on relevant supplier policies, practices, and results. The assessment focuses on twenty-one sustainability criteria that are grouped into four themes: Environment, Labor and Human Rights, Ethics, and Sustainable Procurement.

EcoVadis' expertise in corporate social responsibility enables them to produce internationally comparable ratings and detailed scorecards that highlight the strengths and improvement areas of supplier performance. In particular, the EcoVadis reports help determine supplier performance in relation to human rights and labour practices, including child labour and modern slavery.

If supplier performance results do not meet the expectations under our supplier code of conduct, the university will invoke the contract terms of the supplier code and/or work with the supplier to understand remediation steps and future actions. If this is not forthcoming, we would terminate the agreement. To date, we have not had any such incidents.

### **Policies and due diligence**

Purchasing Policy and Supplier Code of Conduct

UVic is committed to respecting human rights and ensuring that child labour and modern slavery are not present in our supply chain. UVic's Purchasing Policy (FM5105) guiding principles include the application of triple bottom line considerations that recognize financial, social, and environmental impacts of purchases. To that effect, UVic established a [Supplier Code of Conduct](#) (SCoC) in early 2020. The SCoC applies to all suppliers who provide goods or services to UVic, as well as their subcontractors. It establishes the minimum ethical, social, and environmental standards expected of UVic suppliers. Additional requirements may be described in individual contracts executed with UVic.

This SCoC is intended to support our commitment to environmental, social, and institutional sustainability by clearly establishing minimum standards required to do business with UVic, in alignment with triple-bottom-line procurement goals identified in UVic's [Sustainability Action Plan](#).

Modern slavery is a potential issue that the sustainable procurement initiative aims to address. While anti-slavery laws have existed in Canada for centuries, the problem of slavery still exists and is flourishing in the complexities of global supply chains. UVic's Sustainable Procurement Initiative allowed UVic to investigate, report on, and mitigate human rights violations in its supply chain.

UVic's Supplier Code of Conduct prohibits suppliers from using child or forced labour and sets minimum standards for other human rights violations associated with modern slavery, including wages, disciplinary practices, and hours of work.

The SCoC also aligns with the International Labour Organization's Declarations on Fundamental Principles and Rights of Work, the United Nation's Sustainable Development Goals, and the United Nations Convention on the Rights of the Child. While UVic believes in cooperation and is willing to work with suppliers to improve practices, when necessary, a supplier's failure to adhere to the provisions in the SCoC may be a breach of contract and could result in that contract's termination.

Sections 2 and 3 of the UVic Supplier Code of Conduct specifically state:

## 2. Child Labour

Suppliers will:

- a.** not employ people under the age of 15 (or 14 where the International Labour Organization exemption for developing countries applies); and
- b.** if a child must be displaced to comply with laws and this Code of Conduct, offer adult family members of that child a position to maintain family earnings.
- c.** ensure that employees under the age of eighteen (18) shall not perform hazardous work that may jeopardize their health, safety or morals. Hazardous work includes, but is not limited to, work at dangerous heights or in confined spaces; work with hazardous substances, dangerous machinery, equipment and tools, work that involves the manual handling or transport of heavy loads; night work and long hours of work.

## 3. Forced Labour

Suppliers will:

- a. not use forced, illegal, or prison labour, including indentured or bonded labour, or any form of compulsory labour to manufacture products.
- b. Suppliers and their subcontractors shall ensure that recruitment of employees, whether directly or indirectly, complies with applicable laws and regulations. Employees shall not pay any fees or other payments to the employer or agent for the purpose of being hired or as a condition of employment. No such fees shall be deducted and withheld from wages or otherwise passed on to the employees.
- c. Suppliers and their subcontractors shall not retain employees' identity papers or passports

The Supplier Code of Conduct has been incorporated to supply contracts and services agreements using the following language:

*UVic is committed to global leadership in environmental, social and institutional sustainability and expects Contractor to integrate a corporate social responsibility approach to their business practices, as reflected in the Supplier Code of Conduct ("SCoC") [available at <https://www.uvic.ca/purchasing/assets/docs/uvicsuppliercodeofconduct.pdf>]. The SCoC is hereby incorporated by reference and forms part of this Agreement.*

*If you are not in compliance with the SCoC, UVic will inform you in writing, including of the provisions that you have breached. You will have the time specified in the foregoing notice of breach to propose a remediation plan for approval by UVic, which remediation plan will include the time required by you to become compliant with the SCoC. If no remediation plan is submitted as required, if UVic does not approve a remediation plan within 14 days of receipt of your initial proposed remediation plan, or if you fail to achieve your remediation plan, UVic may immediately terminate this Agreement on notice in writing to you.*

In cases where the supplier has an existing, equivalent code of conduct, the following language has been used:

*Supplier acknowledges the UVic's Supplier Code of Conduct ("SCoC") found at : <https://www.uvic.ca/purchasing/assets/docs/uvicsuppliercodeofconduct.pdf> and Supplier affirms it abides by its own, similar Code of Conduct found at: [https://www.\\*\\*\\*](https://www.***). Supplier's strict adherence to its parent company, \*\*\*, Code of Conduct and policies shall be deemed to be adherence with the UVic's SCoC.*

The bookstore has a trademark licence contract that must be renewed every year with every supplier that uses the university mark. Those suppliers, who are responsible for most of the branded items manufactured offshore, must agree to UVic's Supplier Code of Conduct and carry liability insurance.

### **Risk assessment and management**

Branded merchandise and apparel have been identified as potential higher risk commodities. To ensure UVic branded merchandise is fairly traded and ethically sourced locally, nationally, or internationally, the UVic bookstore considers the Fair Labour Association (FLA) and Workers Rights Consortium (WRC) best practices. As member of National Association of College Stores (NACS), Independent College bookstore Association (ICBA), and Campus Stores Canada (CSC), the UVic bookstore participate in and source clothing and gifts at national tradeshow that have been vetted and approved by these associations.

The Purchasing Services department hired a Sustainability Scholar for a 3-month research project in 2024 to develop and establish a plan for increased adoption of the business sustainability assessments amongst clients and EcoVadis.

### **Remediation**

If forced labour issues in the supply chain are identified with a supplier, UVic may consider a remediation plan presented by the supplier. If no remediation plan is submitted or if UVic does not approve a remediation plan, UVic may terminate the supply agreement.

### **Loss of income mitigation**

No specific cases of forced labour or child labour in UVic's supply chains have been identified and so no measures have been taken to eliminate such practices.

### **Training**

At UVic, a variety of staff, faculty, and leadership are developing training initiatives that teach and address the United Nations Sustainable Development Goals. CIFAL Victoria has created a [data dashboard on SDGs at UVic](#), showing over one hundred current initiatives. Fifty-four of those initiatives are related to SDG 8 – Decent Work and Economic Growth, which includes Target 8.7: end modern slavery, trafficking, and child labour.

UVic's Purchasing Services staff receive ongoing training on sustainable procurement and have an understanding of modern slavery risks. Internal clients and suppliers are frequently engaged one-on-one by Purchasing Services staff to consider supply chain environmental and social impacts and collaborate to conduct business sustainability assessments. UVic organized a presentation on [Modern Slavery in Supply Chains and the Case for a Supplier Code of Conduct](#) at the 2021 Canadian Association of University Business Officers (CAUBO) conference and has continued to collaborate with stakeholders to raise awareness of the issues and mitigate risks.

The Purchasing Services team, including Purchasing Officers and Buyers, have been trained on Sustainable Procurement. The training includes awareness of the UVic Supplier Code of Conduct, how to incorporate the SCoC in public competitions and university contracts, and an understanding of the EcoVadis business sustainability assessments.

The Financial Services Training Series training material on Purchasing Services, for faculty and staff, includes an overview of the SCoC, as well as the business sustainability assessments, highlighting the labour and human rights theme.

### **Monitoring**

UVic relies on EcoVadis business sustainability ratings to monitor the performance of suppliers enrolled in their assessment program, including on labour practices and human rights. The assessments examine the potential for modern slavery in the upstream supply of raw materials and components, as well as in manufacturing facilities. By March 2025, 74 suppliers have been assessed and 23 are in progress. Over the course of the next reporting year, UVic intends to continue engaging key suppliers to be assessed by

EcoVadis, setting clear key performance indicators, and monitoring supplier performance on labour and human rights practices.

Sign off

\*\*\* The report must be presented to UVic's governing body and approved. \*\*\*

This statement is made pursuant to Bill S-211, An Act to enact the Fighting Against Forced Labour and Child Labour in Supply Chains Act for the fiscal year ending March 31, 2024. It has been issued on behalf of the University of Victoria Board of Governors.

Signed,



University  
of Victoria

BOG-May27/25-08

## SUBMISSION TO THE UVIC BOARD OF GOVERNORS

**Date:** May 16, 2025

**To:** Audit Committee

**For:** Decision

**From:** Kristi Simpson, Vice-President Finance and Operations

**cc:** President and Vice-Chancellor

**Meeting Date:** May 27, 2025

**Subject:** 2024/25 Financial Statements & Annual Financial Report

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### Recommendation:

*THAT the Audit Committee recommend to the Board of Governors that the Board of Governors approve the 2024/25 Audited Financial Statements, Annual Financial Report and the appropriations as set out in the attached schedules;*

*and*

*THAT the Chair of the Board of Governors and the Vice-President Finance and Operations be authorized to sign the statements on behalf of the Board of Governors.*

### Background:

The Audit Committee has the responsibility of reviewing and recommending approval of the audited financial statements to the Board of Governors.

Highlights of the audited financial statements for the year ended March 31, 2025, will be presented at the Audit Committee.

The Annual Financial Report for 2024-25, previously named Management Discussion and Analysis, has been restructured to make the report more accessible to the general public in order to increase transparency.

**Planned Further Action:**

Once approved, the 2024-25 Annual Financial Report will be published online once the Public Accounts of the Province of BC are complete. At such time, financial statements and any accompanying annual reports may be published.

**Basis for Jurisdiction:** University Act 27.1

**Attachment(s):**

Appendix 1 – Draft Audited Financial Statements 2024-25

Appendix 2 – Appropriated Expendable Funds

Appendix 3 – Draft Annual Financial Report (previously named Management Discussion and Analysis)

Consolidated Financial Statements of

**UNIVERSITY OF VICTORIA**

And Independent Auditor's Report Thereon

Year ended March 31, 2025



## STATEMENT OF ADMINISTRATIVE RESPONSIBILITY FOR FINANCIAL STATEMENTS

The University is responsible for the preparation and presentation of the accompanying consolidated financial statements, including responsibility for significant accounting judgments and estimates in accordance with Canadian public sector accounting standards and Treasury Board direction outlined in Note 2(a). This responsibility includes selecting appropriate accounting principles and methods and making decisions affecting measurement of transactions in which objective judgment is required. In fulfilling its responsibilities and recognizing the limits inherent in all systems, the University's management has developed and maintains a system of internal controls designed to provide reasonable assurance that the University assets are safeguarded from loss and that the accounting records are a reliable basis for the preparation of financial statements. The system of internal controls is monitored by the University's management.

The Board of Governors carries out its responsibility for review of the financial statements principally through its audit committee. The members of the Audit Committee are not officers or employees of the University. The Audit Committee meets with management and with the internal and external auditors to discuss the results of audit examinations and financial reporting matters. The auditors have full access to the Audit Committee, with and without the presence of management.

The consolidated financial statements have been examined by KPMG LLP, an independent firm of Chartered Professional Accountants. The Independent Auditor's Report outlines the nature of the examination and the opinion on the consolidated financial statements of the University for the year ended March 31, 2025.

On behalf of the University:

\_\_\_\_\_ Chair, Board of Governors

\_\_\_\_\_ Vice-President Finance and Operations

# UNIVERSITY OF VICTORIA

## Consolidated Statement of Financial Position

As at March 31, 2025

(in thousands of dollars)

		2025	2024
<b>Financial Assets</b>			
Cash and cash equivalents	(Note 3)	\$ 213,714	\$ 175,040
Accounts receivable	(Note 4)	18,770	19,526
Due from governments	(Note 5)	27,707	20,040
Inventories for resale		1,399	1,415
Portfolio investments	(Note 6)	250,241	232,564
Derivatives	(Note 6)	-	88
Loans receivable	(Note 7)	33,780	33,321
Employee future benefits	(Note 8)	44,641	36,677
Investments in government business enterprises	(Note 9)	4,907	4,131
		595,159	522,802
<b>Liabilities</b>			
Accounts payable and accrued liabilities	(Note 11)	63,167	49,733
Derivatives	(Note 6)	157	-
Due to governments		8,940	8,750
Deferred revenue		26,366	26,991
Deferred contributions	(Note 12)	342,379	306,553
Deferred capital contributions	(Note 13)	611,958	528,693
Debt	(Note 14)	125,441	127,481
Asset retirement obligations	(Note 15)	58,009	53,712
		1,236,417	1,101,913
Net debt		(641,258)	(579,111)
<b>Non-financial Assets</b>			
Tangible capital assets	(Note 16)	1,113,222	1,037,200
Restricted endowment investments	(Note 6)	470,829	455,457
Inventories held for use		2,560	3,461
Prepaid expenses		30,358	23,908
		1,616,969	1,520,026
Accumulated surplus	(Note 18)	\$ 975,711	\$ 940,915
Accumulated surplus is comprised of:			
Endowments	(Note 19)	\$ 470,829	\$ 455,457
Invested in tangible capital assets		340,868	347,941
Internally restricted		135,520	116,907
Unrestricted		18,082	13,309
Accumulated operating surplus		965,299	933,614
Accumulated remeasurement gains		10,412	7,301
Accumulated surplus		\$ 975,711	\$ 940,915

Contractual rights (Note 20)

Contractual obligations (Note 21)

Contingent liabilities (Note 22)

# UNIVERSITY OF VICTORIA

## Consolidated Statement of Operations and Accumulated Surplus

Year ended March 31, 2025

(in thousands of dollars)

	Budget (Note 2(p))	2025	2024
Revenue:			
Province of British Columbia grants	\$ 301,007	\$ 303,081	\$ 275,974
Government of Canada grants	103,138	103,635	101,116
Other government grants	23,200	21,030	18,574
Student tuition - credit courses	162,761	164,787	160,362
Student tuition - non-credit courses	21,095	24,829	24,526
Donations, non-government grants and contracts	23,200	31,638	26,285
Sales of services and products	84,985	81,460	77,275
Investment income	36,000	36,935	40,190
Income/(loss) from government business enterprises (Note 9)	-	750	1,081
Other revenue	6,000	10,850	9,697
Revenue recognized from deferred capital contributions (Note 13)	29,389	29,299	26,672
	790,775	808,294	761,752
Expenses: (Note 23)			
Instruction and non-sponsored research	315,987	304,909	301,274
Academic and student support	194,687	201,520	185,622
Administrative support and general expenses	32,693	32,468	31,171
Facility operations and maintenance	73,700	76,720	70,268
Sponsored research	153,349	157,409	146,209
External engagement	20,011	18,955	19,079
	790,427	791,981	753,623
Annual operating surplus	348	16,313	8,129
Restricted endowment contributions			
Endowment principal donations (Note 19)	8,000	4,736	6,288
Donations capitalized (Note 19)	8,000	10,636	13,025
	16,000	15,372	19,313
Annual surplus	16,348	31,685	27,442
Accumulated operating surplus, beginning of year	933,614	933,614	906,172
Accumulated operating surplus, end of year	\$ 949,962	\$ 965,299	\$ 933,614

# UNIVERSITY OF VICTORIA

## Consolidated Statement of Changes in Net Debt

Year ended March 31, 2025

(in thousands of dollars)

	Budget (Note 2(p))	2025	2024
Annual surplus	\$ 16,348	\$ 31,685	\$ 27,442
Acquisition of tangible capital assets	(169,045)	(125,848)	(106,210)
Increase in tangible capital assets related to asset retirement obligations	-	(2,192)	(3,355)
Amortization of tangible capital assets	52,842	52,018	48,661
	(116,203)	(76,022)	(60,904)
Increase in restricted endowment investments	-	(15,372)	(19,313)
Acquisition of inventories held for use	-	(971)	(1,588)
Acquisition of prepaid expense	-	(31,056)	(22,580)
Consumption of inventories held for use	-	1,872	1,278
Use of prepaid expense	-	24,606	20,521
	-	(20,921)	(21,682)
Net remeasurement gains	-	3,111	1,105
Increase in net debt	(99,855)	(62,147)	(54,039)
Net debt, beginning of year	(579,111)	(579,111)	(525,072)
Net debt, end of year	\$ (678,966)	\$ (641,258)	\$ (579,111)

**UNIVERSITY OF VICTORIA****Consolidated Statement of Remeasurement Gains and Losses****Year ended March 31, 2025***(in thousands of dollars)*

	2025	2024
Accumulated remeasurement gains, beginning	\$ 7,301	\$ 6,196
Unrealized gains (losses) attributed to:		
Portfolio investments	2,465	5,418
Derivatives	(245)	988
Foreign currency translation	891	492
Realized gains reclassified to the Consolidated Statement of Operations, attributed to:		
Derivatives	-	(5,793)
Net remeasurement gains for the year	3,111	1,105
Accumulated remeasurement gains, end of year	\$ 10,412	\$ 7,301

**UNIVERSITY OF VICTORIA**  
**Consolidated Statement of Cash Flows**  
**Year ended March 31, 2025**  
*(in thousands of dollars)*

	2025	2024
Cash provided by (used in):		
Operations:		
Annual surplus	\$ 31,685	\$ 27,442
Items not involving cash		
Amortization of tangible capital assets	52,018	48,661
Revenue recognized from deferred capital contributions	(29,299)	(26,672)
Change in employee future benefits	(7,964)	(3,939)
Change in investments in government business enterprises	(776)	(761)
Unrealized remeasurement gains on foreign exchange	891	492
Amortization of debt discount	511	490
Accretion expense	2,105	1,528
Changes in non-cash operating working capital:		
Decrease (increase) in accounts receivable	756	(3,833)
(Increase) decrease in loans receivable	(459)	273
Decrease (increase) in inventories	917	(450)
Increase in prepaid expenses	(6,450)	(2,059)
Increase (decrease) in accounts payable and accrued liabilities	13,434	(9,004)
(Decrease) increase in due to/from government organizations	(7,477)	12,862
(Decrease) increase in deferred revenue	(625)	4,125
Increase in deferred contributions	35,826	67,093
Net change from operating activities	85,093	116,248
Capital activities:		
Acquisition of tangible capital assets	(125,848)	(106,210)
Net change from capital activities	(125,848)	(106,210)
Investing activities:		
Net acquisition of portfolio investments	(15,212)	(17,277)
Net acquisition of restricted endowment investments	(15,372)	(19,313)
Net change from investing activities	(30,584)	(36,590)
Financing activities:		
Proceeds of debt	-	23,876
Repayment of debt	(2,551)	(29,799)
Receipt of deferred capital contributions	112,564	60,758
Net change from financing activities	110,013	55,325
Net change in cash and cash equivalents	38,674	28,283
Cash and cash equivalents, beginning of year	175,040	146,757
Cash and cash equivalents, end of year	\$ 213,714	\$ 175,040

# UNIVERSITY OF VICTORIA

## Notes to Consolidated Financial Statements

Year ended March 31, 2025

(tabular figures in thousands of dollars)

### 1. Authority and purpose

The University of Victoria (the “University”) operates under the authority of the *University Act* of British Columbia. The University is a not-for-profit entity governed by a 15 member Board of Governors, eight of whom are appointed by the government of British Columbia including two on the recommendation of the Alumni Association. The University is a registered charity and is exempt from income taxes under section 149 of the *Income Tax Act*.

### 2. Summary of significant accounting policies

The consolidated financial statements of the University are prepared by management in accordance with the basis of accounting described below. Significant accounting policies of the University are as follows:

#### (a) Basis of accounting

The consolidated financial statements have been prepared in accordance with Section 23.1 of the *Budget Transparency and Accountability Act* of the Province of British Columbia supplemented by Regulations 257/2010 and 198/2011 issued by the Province of British Columbia Treasury Board.

The *Budget Transparency and Accountability Act* requires that the consolidated financial statements be prepared in accordance with the set of standards and guidelines that comprise generally accepted accounting principles for senior governments in Canada, or if the Treasury Board makes a regulation, the set of standards and guidelines that comprise generally accepted accounting principles for senior governments in Canada as modified by the alternate standard or guideline or part thereof adopted in the regulation.

Regulation 257/2010 requires all taxpayer supported organizations in the Schools, Universities, Colleges and Hospitals sectors to adopt Canadian public sector accounting standards without any PS4200 elections related to not-for-profit accounting standards.

Regulation 198/2011 requires that restricted contributions received or receivable are to be reported as revenue depending on the nature of the restrictions on the use of the funds as follows:

- Contributions for the purposes of acquiring or developing a depreciable tangible capital asset or contributions in the form of a depreciable tangible capital asset are to be deferred and recognized in revenue at the same rate that amortization of the related tangible capital asset is recorded.
- Contributions restricted for specific purposes other than those for the acquisition or development of a depreciable tangible capital asset are recorded as deferred contributions and recognized in revenue in the period in which the stipulation or restriction on the contributions have been met.

For British Columbia taxpayer supported organizations, these contributions include government transfers and externally restricted contributions.

# UNIVERSITY OF VICTORIA

## Notes to Consolidated Financial Statements

Year ended March 31, 2025

*(tabular figures in thousands of dollars)*

### 2. Summary of significant accounting policies (continued)

#### (a) Basis of accounting (continued)

The accounting policy requirements under Regulation 198/2011 are significantly different from the requirements of Canadian public sector accounting standards which requires that:

- government transfers, which do not contain a stipulation that creates a liability, be recognized as revenue by the recipient when approved by the transferor and the eligibility criteria have been met in accordance with public sector accounting standard PS3410; and
- externally restricted contributions be recognized as revenue in the period in which the resources are used for the purpose or purposes specified in accordance with public sector accounting standard PS3100.

As a result, revenue recognized in the consolidated statement of operations and accumulated surplus and certain related deferred capital contributions would be recorded differently under Canadian public sector accounting standards.

#### (b) Basis of consolidation

##### (i) Consolidated entities

The consolidated financial statements reflect the assets, liabilities, revenues, and expenses of organizations which are controlled by the University. Controlled organizations are consolidated except for government business enterprises which are accounted for by the modified equity method. Inter-organizational transactions, balances, and activities have been eliminated on consolidation.

The following organizations are controlled by the University and fully consolidated in these financial statements:

- UVic Industry Partnerships (formerly University of Victoria Innovation and Development Corporation) which facilitates research partnerships between the private sector and the University.
- University of Victoria Properties Investments Inc. which manages the University's real estate holdings including the Vancouver Island Technology Park Trust.
- Ocean Networks Canada Society which manages the University's VENUS and NEPTUNE ocean observatories.
- Pacific Climate Impacts Consortium which stimulates collaboration to produce climate information for education, policy and decision making.



# UNIVERSITY OF VICTORIA

## Notes to Consolidated Financial Statements

Year ended March 31, 2025

*(tabular figures in thousands of dollars)*

### 2. Summary of significant accounting policies (continued)

#### (b) Basis of consolidation (continued)

##### (i) Consolidated entities (continued)

- University of Victoria Foundation, the Foundation for the University of Victoria, and the U.S. Foundation for the University of Victoria which encourage the financial support of the University and administer the University's endowment funds.
- Byron Price & Associates Ltd. which holds land in North Saanich.

##### (ii) Investment in government business enterprises

Government business enterprises are accounted for by the modified equity method. Under this method, the University's investment in the business enterprise and its net income and other changes in equity are recorded. No adjustment is made to conform the accounting policies of the government business enterprise to those of the University other than if other comprehensive income exists, it is accounted for as an adjustment to accumulated surplus (deficit). Inter-organizational transactions and balances have not been eliminated, except for any profit or loss on transactions between entities of assets that remain within the entities controlled by the University.

The following organizations are controlled by the University and consolidated in these financial statements using the modified equity basis:

- Heritage Realty Properties Ltd. which manages the property rental and downtown hotel and brew-pub operation donated by the late Michael C. Williams.
- Vancouver Island Technology Park Trust which provides leased space to high-technology companies on Vancouver Island.
- GSB Executive Education Inc. provides executive training and other non-credit education.

##### (iii) Investment in government partnerships

Government partnerships that are business partnerships are accounted for by the modified equity method. Accounting policies of the business partnership are not conformed to those of the partners before the equity pick-up. The University is not party to any government business partnerships.

Government partnerships that are not wholly controlled business partnerships are accounted for under the proportionate consolidation method. The University accounts for its share of the partnership on a line by line basis on the financial statements and eliminates any inter-organizational transactions and balances. Accounting policies of the partnership, which is not a business partnership, are conformed to those of the University before it is proportionately consolidated.

# UNIVERSITY OF VICTORIA

## Notes to Consolidated Financial Statements

Year ended March 31, 2025

*(tabular figures in thousands of dollars)*

### 2. Summary of significant accounting policies (continued)

#### (b) Basis of consolidation (continued)

##### (iii) Investment in government partnerships (continued)

The following organization is a government partnerships and is proportionately consolidated in these financial statements:

- Western Canadian Universities Marine Sciences Society (WCUMSS) which operates a marine research facility at Bamfield on the west coast of Vancouver Island. These financial statements include the University's 20% interest.

##### (iv) Trusts under administration

Trusts administered by the University are not consolidated in the financial statements as the assets are not held for the benefit of the University.

##### (v) Funds held in trust

Funds held in trust by the University as directed by agreement or statute for certain beneficiaries are not included in the University's consolidated financial statements.

#### (c) Cash and cash equivalents

Cash and cash equivalents include highly liquid investments readily convertible to known amounts of cash and subject to insignificant risk of changes in value. They are held for the purpose of meeting short-term cash commitments rather than investing.

#### (d) Loans receivable

Loans receivable are recorded at amortized cost. Interest is accrued on loans receivable to the extent it is deemed collectable.

#### (e) Financial instruments

Financial instruments are classified into two categories: fair value or cost.

##### (i) Fair value category

Portfolio instruments that are quoted in an active market and derivative instruments are reflected at fair value as at the reporting date. Other financial instruments designated to be recorded at fair value are endowment and portfolio investments. Transaction costs related to the acquisition of investments are recorded as an expense. Sales and purchases of investments are recorded at trade date.

# UNIVERSITY OF VICTORIA

## Notes to Consolidated Financial Statements

Year ended March 31, 2025

*(tabular figures in thousands of dollars)*

### 2. Summary of significant accounting policies (continued)

#### (e) Financial instruments (continued)

##### (i) Fair value category (continued)

Unrealized gains and losses on financial assets are recognized in the consolidated statement of remeasurement gains and losses until such time that the financial asset is derecognized due to disposal or impairment. At the time of derecognition, the related realized gains and losses are recognized in the consolidated statement of operations and accumulated surplus and related balances reversed from the consolidated statement of remeasurement gains and losses. Unrealized gains and losses in endowment investments, where earnings are restricted as to use, are recorded as deferred contributions and recognized in revenue when disposed and when related expenses are incurred. Restricted unrealized gains spent to meet current year endowment expenses or capitalization transfers are recorded in the consolidated statement of remeasurement gains and losses. Canadian public sector accounting standards require an organization to classify fair value measurements using a fair value hierarchy, which includes three levels of information that may be used to measure fair value:

- Level 1 – Unadjusted quoted market prices in an active market for identical assets or liabilities;
- Level 2 – Observable or corroborated inputs, other than level 1, such as quoted prices for similar assets or liabilities in active markets or market data for substantially the full term of the assets or liabilities; and
- Level 3 – Unobservable inputs that are supported by little or no market activity and that are significant to the fair value of the assets and liabilities.

##### (ii) Cost category

Gains and losses are recognized in the consolidated statement of operations and accumulated surplus when the financial asset is derecognized due to disposal or impairment and the gains and losses are recognized at amortized cost using the effective interest method; accounts payable and accrued liabilities and debt are measured at amortized cost using the effective interest method.

The underwriting discount along with consulting fees relating to the debenture issuances are capitalized and amortized to match the term of the long-term debenture. Amortization is calculated based on the effective interest rate method.

#### (f) Short-term investments

Short-term investments are comprised of money market securities and other investments with maturities that are capable of prompt liquidation. Short-term investments are cashable on demand and are recorded at cost based on the transaction price on the trade date. All interest income, gains and losses are recognized in the period in which they arise.

# UNIVERSITY OF VICTORIA

## Notes to Consolidated Financial Statements

Year ended March 31, 2025

*(tabular figures in thousands of dollars)*

### 2. Summary of significant accounting policies (continued)

#### (g) Inventories for resale

Inventories held for resale, including books, merchandise and food are recorded at the lower of cost or net realizable value. Cost includes the original purchase cost, plus shipping and applicable duties. Net realizable value is the estimated selling price less any costs to sell.

#### (h) Asset retirement obligations

An asset retirement obligation ("ARO") is recognized when, as at the financial reporting date, all of the following criteria are met:

- There is a legal obligation to incur retirement costs in relation to a tangible capital asset
- The past transaction or event giving rise to the liability has occurred
- It is expected that future economic benefits will be given up; and
- A reasonable estimate of the amount can be made

Certain buildings owned by the University contain asbestos and other hazardous materials. The ARO liability for the removal of asbestos and other hazardous materials in buildings owned by the University has been recognized based on the estimated future expenses to remediate the buildings.

Under the modified retrospective method, the assumptions used on initial recognition are those as of the date of adoption of the standard. Assumptions used in the subsequent calculations are revised annually. When the amount and timing of future cash flows of a remediation or demolition of a project are known, the liability is discounted using a present value calculation, and adjusted yearly for accretion expense up to the time the project commences.

The recognition of the ARO liability resulted in an accompanying increase to the respective tangible capital assets. The increase in building assets is being amortized in accordance with the amortization accounting policy outlined in Note 2(i)(i).

#### (i) Non-financial assets

Non-financial assets are not available to discharge existing liabilities and are held for use in the provision of services. They have useful lives extending beyond the current year and are not intended for sale in the ordinary course of operations.

##### (i) Tangible capital assets

Tangible capital assets are recorded at cost, which includes amounts that are directly attributable to acquisition, construction, development or betterment of the asset. Interest is capitalized during construction whenever external debt is issued to finance the construction of tangible capital assets.

# UNIVERSITY OF VICTORIA

## Notes to Consolidated Financial Statements

Year ended March 31, 2025

(tabular figures in thousands of dollars)

### 2. Summary of significant accounting policies (continued)

(i) Non-financial assets (continued)

(i) Tangible capital assets (continued)

The cost, less residual value of the tangible capital assets, are amortized on a straight line basis over their estimated useful lives. Land is not amortized as it is deemed to have a permanent value.

Asset	Straight line Rate
Buildings - Concrete	50 years
Buildings - Woodframe	30 years
Buildings - Heritage	35 years
Site Improvements	30 years
Equipment - Computing	3 years
Equipment - Other	8 years
Information Systems	8 years
Furnishings	8 years
Library Holdings	10 years
Ships/Vessels	25 years

Donated assets are recorded at fair value at the date of donation. In unusual circumstances where fair value cannot be reasonably determined, the tangible capital asset would be recorded at a nominal value.

Assets under construction are not amortized until the asset is available for productive use.

Tangible capital assets are written down when conditions indicate that they no longer contribute to the University's ability to provide goods and services, or when the value of future economic benefits associated with the tangible capital assets are less than their net book value.

(ii) Works of art and historic assets

Works of art and historic assets are not recorded as assets in these financial statements.

(iii) Leased capital assets

Leases which transfer substantially all of the benefits and risks incidental to ownership of property are accounted for as leased tangible capital assets. All other leases are accounted for as operating leases and the related payments are charged to expenses as incurred.

# UNIVERSITY OF VICTORIA

## Notes to Consolidated Financial Statements

Year ended March 31, 2025

*(tabular figures in thousands of dollars)*

### 2. Summary of significant accounting policies (continued)

(i) Non-financial assets (continued)

(iv) Inventories held for use

Inventories held for use are recorded at the lower of cost and replacement cost.

(j) Employee future benefits

The costs of pension and other future employee benefits are recognized on an accrual basis over the working lives of employees as detailed in Note 8.

(k) Revenue recognition

Tuition and student fees and sales of goods and services are reported as revenue at the time the services are provided or the products are delivered, and collection is reasonably assured.

Unrestricted donations and grants are recorded as revenue when receivable if the amounts can be estimated and collection is reasonably assured.

Restricted donations and grants are reported as revenue depending on the nature of the restrictions on the use of the funds by the contributors as follows:

(i) Contributions for the purpose of acquiring or developing a depreciable tangible capital asset or in the form of a depreciable tangible capital asset, in each case for use in providing services are recorded and referred to as deferred capital contributions and recognized in revenue at the same rate that amortization of the tangible capital asset is recorded. The reduction of the deferred capital contributions and the recognition of the revenue are accounted for in the fiscal period during which the tangible capital asset is used to provide services.

(ii) Contributions restricted for specific purposes other than for those to be held in perpetuity or the acquisition or development of a depreciable tangible capital asset are recorded as deferred contributions and recognized in revenue in the year in which the stipulation or restriction on the contribution have been met.

(iii) Contributions restricted to be retained in perpetuity, allowing only the investment income earned thereon to be spent are recorded as restricted endowment contributions in the statement of operations and accumulated surplus for the portion to be held in perpetuity and as deferred contributions for any restricted investment income earned thereon.

Investment income includes interest recorded on an accrual basis and dividends recorded as declared, realized gains and losses on the sale of investments, and write-downs on investments where the loss in value is determined to be other-than-temporary.

# UNIVERSITY OF VICTORIA

## Notes to Consolidated Financial Statements

Year ended March 31, 2025

*(tabular figures in thousands of dollars)*

### 2. Summary of significant accounting policies (continued)

(l) Pledges, gifts-in-kind and contributed services

Pledges from donors are recorded when payment is received by the University or the transfer of property is completed since their ultimate collection cannot be reasonably assured until that time. Gifts-in-kind include securities and equipment which are recorded in the financial statements at their fair market value at the time of donation. The value of contributed services is not determinable and is not recorded in the financial statements.

(m) Use of estimates

Preparation of the financial statements in accordance with Canadian public sector accounting standards requires management to make estimates and assumptions. These estimates and assumptions affect the reported amounts of assets, liabilities, and related disclosures. Key areas where management has made estimates and assumptions include those related to the amortization period of tangible capital assets, asset retirement obligations, valuation allowances for receivables and inventories, the valuation of financial instruments and assets and obligations related to employee future benefits. Where actual results differ from these estimates and assumptions, the impact will be recorded in future periods when the difference becomes known.

(n) Foreign currency translation

Transactions in foreign currencies are translated into Canadian dollars at the exchange rate in effect on the transaction date. Monetary assets and liabilities denominated in foreign currencies and non-monetary assets and liabilities which were designated in the fair value category under the financial instrument standard are reflected in the financial statements in equivalent Canadian dollars at the exchange rate in effect on the statement of financial position date. Any gain or loss resulting from a change in rates between the transaction date and the settlement date or statement of financial position date is recognized in the consolidated statement of remeasurement gains and losses. In the period of settlement, any exchange gain or loss is reversed out of the consolidated statement of remeasurement gains and losses, and reflected in the consolidated statement of operations and accumulated surplus.

(o) Functional classification of expenses

Expenses on the consolidated statement of operations and accumulated surplus have been classified based on functional lines of service provided by the University. The outline of services provided by each function is as follows:

- (i) Instruction and non-sponsored research - This function includes expenses related to all direct educational delivery within the institution. This would include credit and non-credit courses, diploma, certificate and degree granting programs; continuing education; developmental education and on-line delivery. Costs associated with this function include the Deans, Directors and Chairs; instructional administration; and support staff and support costs related to these activities. Non-sponsored research is research activity funded by the university and includes faculty research start-ups; the Office of the Vice President of Research and Innovation and associated research projects; and research centres.



# UNIVERSITY OF VICTORIA

## Notes to Consolidated Financial Statements

Year ended March 31, 2025

*(tabular figures in thousands of dollars)*

### 2. Summary of significant accounting policies (continued)

#### (o) Functional classification of expenses (continued)

- (ii) Academic and student support - This function includes activities that directly support the academic functions of the University as well as centralized functions that support individual students or groups of students. These include: libraries; records and admissions; scheduling; student service administration; student recruitment; co-op programming; counseling and career services; financial aid administration; scholarships and bursaries; student social development and recreation; Office of Indigenous Affairs; student computer labs. Also included are costs associated with Ancillary Operations (including interest and amortization) such as the bookstore and regalia; residence housing, food, conference and child care services.
- (iii) Administrative support and general expenses - This function includes activities that support the institution as a whole such as the Office of the President; the University Secretary and the Board of Governors; finance and financial operations; internal audit; budget and planning; human resources; general counsel; institutional research; and a portion of informational technology and telecommunications.
- (iv) Facility operations and maintenance - This function includes the operations and maintenance of the physical plant and plant equipment for all institutional activities; capital asset amortization expense for building, site and plant equipment; accretion expense on asset retirement obligations; utilities; facilities administration; custodial services; landscaping and grounds keeping; major repairs and renovations; security services and capital-related interest. This function also includes the ancillary operations of parking services and the University of Victoria Broad St. properties; Heritage Realty Properties Ltd.; and University of Victoria Properties Investments Inc.
- (v) Sponsored research - This function includes research activities specifically funded by contracts with and/or grants from external organizations and undertaken within the institution to produce research outcomes. Also included are joint ventures such as WCUMSS and subsidiaries such as the Pacific Climate Impacts Consortium and Ocean Networks Canada Society, solely incorporated for sponsored research.
- (vi) External engagement - This function includes all activities provided in support of ongoing external relations. These activities include advancement and development (fundraising); alumni relations; community and government relations; corporate relations; marketing and communications; ceremonies; and art galleries.

#### (p) Budget figures

Budget figures have been provided for comparative purposes. The budget was approved by the Board of Governors of the University on September 24, 2024 and provided to the Province. The budget is reflected in the consolidated statement of operations and accumulated surplus and the consolidated statement of changes in net debt.



**UNIVERSITY OF VICTORIA****Notes to Consolidated Financial Statements****Year ended March 31, 2025***(tabular figures in thousands of dollars)***3. Cash and cash equivalents**

	2025	2024
Cash	\$ 72,021	\$ 40,665
Short-term investments	141,693	134,375
	\$ 213,714	\$ 175,040

**4. Accounts receivable**

	2025	2024
Revenues receivable	\$ 22,671	\$ 23,339
Accrued interest receivable	841	737
Less: provision for doubtful accounts	(4,742)	(4,550)
	\$ 18,770	\$ 19,526

**5. Due from governments**

	2025	2024
Federal government	\$ 20,720	\$ 14,076
Provincial government	6,045	5,492
Other	942	472
	\$ 27,707	\$ 20,040

# UNIVERSITY OF VICTORIA

## Notes to Consolidated Financial Statements

Year ended March 31, 2025

(tabular figures in thousands of dollars)

### 6. Financial instruments

Financial assets and liabilities recorded at fair value are comprised of the following:

#### (a) Portfolio investments

	Fair Value Hierarchy	2025	2024
Portfolio investments carried at fair value:			
Various pooled bond and mortgage funds	Level 1	\$ 152,513	\$ 133,088
Canadian equities	Level 1	2,026	2,085
Global equities	Level 1	61,990	63,048
Infrastructure, real estate and private equity	Level 3	31,810	32,320
		248,339	230,541
Portfolio investments at cost which approximates fair value:			
Short-term investments		830	1,276
Cash		999	662
Other		73	85
Total portfolio investments		\$ 250,241	\$ 232,564

#### (b) Restricted endowment investments

	Fair Value Hierarchy	2025	2024
Restricted endowment investments carried at fair value:			
Various pooled bond and mortgage funds	Level 1	\$ 58,632	\$ 67,273
Global equities	Level 1	287,829	270,979
Infrastructure and real estate	Level 3	116,510	108,640
		462,971	446,892
Restricted endowment investments at cost which approximates fair value:			
Short-term investments		4,173	5,859
Cash		3,685	2,706
Total restricted endowment investments		\$ 470,829	\$ 455,457

# UNIVERSITY OF VICTORIA

## Notes to Consolidated Financial Statements

Year ended March 31, 2025

(tabular figures in thousands of dollars)

### 6. Financial instruments (continued)

(c) Derivatives (See note 14 for breakdown of debt related to derivatives):

	Fair Value Hierarchy	2025	2024
Derivatives - interest rate swaps on debt quoted at fair value:			
Province of British Columbia floating interest rate fixed at 3.56%, commencing 2024 through 2034, unsecured	Level 2	(157)	88
Total derivatives		\$ (157)	\$ 88

### 7. Loans receivable

	2025	2024
Various employees		
Electric bike loans to employees, interest free for 1-2 years, no renewal option, unsecured	\$ 52	\$ 96
Various faculty and senior administrators		
Home relocation loans, interest free for 5 years with option for further renewal unless employment ceases, secured by second mortgages	6,577	6,511
Heritage Realty Properties Ltd.		
Promissory note receivable, interest at Royal Bank Prime + 2.0%, due March 31, 2026, secured by an unregistered equitable mortgage	10,634	10,634
Vancouver Island Technology Park Trust loans receivable		
Promissory note, secured by an unregistered equitable mortgage	8,648	8,648
Interest at 5.13%, due April 2030, unsecured	5,078	5,931
Interest at 6.13%, due April 2030, unsecured	1,291	1,501
Interest at 5.25%, payable on demand, unsecured	1,500	-
	\$ 33,780	\$ 33,321

# UNIVERSITY OF VICTORIA

## Notes to Consolidated Financial Statements

Year ended March 31, 2025

(tabular figures in thousands of dollars)

### 8. Employee future benefits

Employee future benefits arise in connection with the University's group life insurance and accumulated sick leave plans. The University also maintains pension plans, and other retirement and supplementary benefit arrangements for substantially all of its continuing employees.

Summary of employee future benefit assets:

		2025	2024
Staff pension plan	(Note 8(a)(ii))	\$ (57,428)	\$ (49,538)
Supplemental pension obligations	(Note 8(a)(i))	10,702	9,751
Special accumulated sick leave	(Note 8(b))	1,847	2,541
Basic group life insurance plan		238	569
		\$ (44,641)	\$ (36,677)

#### (a) Pension benefits

##### (i) Combination plan

The pension fund for full-time continuing faculty and administrative and academic professional staff is referred to as the Combination Plan. The plan's benefits are derived primarily from defined contributions with a defined benefit minimum. The plan has been accounted for as a defined contribution plan. The employees make contributions equal to 4.00% of salary up to the year's maximum pensionable earnings ("YMPE") plus 6.00% of salary in excess of the YMPE. The University makes contributions equal to 6.37% of salary up to the YMPE plus 8.00% of salary in excess of the YMPE. The university also contributes 4.00% of salary to fund the defined benefit minimum. The latest actuarial valuation for funding purposes as at December 31, 2021 showed that the accrued formula pension benefit liabilities of the Combination Plan were fully funded. The next valuation will be as at December 31, 2024 and is expected to be completed in September 2025. A solely defined contribution plan is available for part-time faculty and administrative and academic professional staff who meet certain eligibility criteria. The University has made contributions to these two plans during the year of \$29,536,000 (2024 - \$30,408,000) and recorded them as a pension expense.

The University provides supplemental pensions in excess of those provided under registered plans. They are fully funded out of the general assets of the University. The accrued liabilities of these arrangements total \$10,702,000 as at March 31, 2025 (2024 - \$9,751,000). The University paid supplemental benefits of \$894,000 in the year (2024 - \$611,000) and recorded employee benefit expense of \$1,010,000 (2024 - \$1,045,000).

# UNIVERSITY OF VICTORIA

## Notes to Consolidated Financial Statements

Year ended March 31, 2025

(tabular figures in thousands of dollars)

### 8. Employee future benefits (continued)

#### (a) Pension benefits (continued)

##### (ii) Staff plan

The Staff Pension Plan (the "Plan") is a contributory defined benefit pension plan made available to regular staff employees that are eligible to join the Plan. The Plan provides pensions based on credited service and final average salary. Based on membership data as at the last actuarial valuation as at December 31, 2022, the average age of the 1,132 active employees covered by the Plan is 48.3. In addition, there are 745 former employees who are entitled to deferred pension benefits averaging \$298 per month. At December 31, 2022, there were 986 pensioners receiving an average monthly pension of \$1,089. The employees make contributions equal to 4.53% of salary that does not exceed the YMPE plus 6.28% of salary in excess of the YMPE. A separate pension fund is maintained. The University makes contributions to the plan in line with recommendations contained in the actuarial valuation. Though the University and the employees both contribute to the pension fund, the University retains the full risk of the accrued benefit obligation. The pension fund assets are invested primarily in Universe bonds and equities.

The University has made contributions to the Plan during the year of \$6,543,000 (2024 – \$6,526,000). The Plan paid benefits in the year of \$16,364,000 (2024 – \$15,670,000).

The net pension asset at March 31 includes the following components:

	2025	2024
Accrued benefit obligation	\$ 285,253	\$ 274,396
Pension fund assets	(358,941)	(340,147)
	(73,688)	( 65,751)
Unamortized actuarial gains	16,260	16,213
<b>Net asset</b>	<b>\$ ( 57,428)</b>	<b>\$ ( 49,538)</b>

Actuarial valuations are performed triennially using the projected benefit prorated method. The latest triennial actuarial valuation completed as at December 31, 2022 reported a going concern surplus and a solvency deficiency (i.e. if the plan were to be wound up on that date) of \$57,243,000. The next required valuation will be as at December 31, 2025, which will be completed in the summer of 2026. As of March 31, 2025, The *Pension Benefits Standards Act* of British Columbia requires minimum annual contributions or the use of letters of credit to fund a portion of the solvency deficiency if the plan's solvency ratio is below 85%. The University has not been required to hold a letter of credit since 2023.

**UNIVERSITY OF VICTORIA**  
**Notes to Consolidated Financial Statements**  
**Year ended March 31, 2025**  
*(tabular figures in thousands of dollars)*

**8. Employee future benefits (continued)**

(a) Pension benefits (continued)

(ii) Staff plan (continued)

This requirement for a letter of credit will be reassessed in conjunction with the next plan valuation and updated solvency funding level. The accrued benefit obligation shown for 2025 is based on an extrapolation of that 2022 valuation. There is an unamortized gain to be amortized on a straight-line basis over the expected average remaining service life of the related employee group (9 years).

The actuarial valuation was based on a number of assumptions about future events, such as inflation rates, interest rates, wage and salary increases and employee turnover and mortality. The assumptions used reflect the University's best estimates. The expected inflation rate is 2%. The discount rate used to determine the accrued benefit obligation is 6.6%. Pension fund assets are valued at market value as at December 31, 2024.

The expected rate of return on pension fund assets is 6.6%. The actual rate of return on Plan assets in 2024 was 10.1%. The total expenses related to pensions include the following components:

	2025	2024
Current period benefit cost	\$ 8,653	\$ 8,923
Amortization of actuarial gains	( 3,529)	( 1,295)
	5,124	7,628
Less: Employee contributions	( 2,511)	( 2,564)
<b>Pension benefit expense</b>	2,613	5,064
Interest cost on the average accrued benefit obligation	17,942	17,243
Expected return on average pension plan assets	( 22,056)	( 20,479)
<b>Pension interest income</b>	( 4,114)	( 3,236)
<b>Total pension expense (income)</b>	\$ (1,501)	\$ 1,828

The Supplementary Retirement Benefit Account is a separate fund available to provide pensioners over the age of 65 with supplemental indexing against inflation beyond that provided by the basic plan above. It is accounted for as a defined contribution plan, with University contributions during the year of \$143,000 (2024 – \$142,000).

# UNIVERSITY OF VICTORIA

## Notes to Consolidated Financial Statements

Year ended March 31, 2025

(tabular figures in thousands of dollars)

### 8. Employee future benefits (continued)

#### (b) Special accumulated sick leave benefit liability

Certain unionized employees of the University are entitled to a special vested sick leave benefit in accordance with the terms and conditions of their collective agreements. Employees who accumulate and maintain a minimum balance of regular sick leave may opt to transfer sick days into this special accumulating and vested benefit. The University recognizes a liability and an expense as days are transferred into this benefit. At March 31, 2025 the balance of this special accumulated sick leave was \$1,847,000 (2024 – \$2,541,000).

#### (c) Other long-term disability plan

An insured long-term disability plan funded entirely by the University was commenced for other staff on July 1, 2000. The University's contribution for the year ending March 31, 2025 was \$1,436,000 (2024 – \$1,407,000).

### 9. Investments in government business enterprises

The University controls three profit-oriented subsidiaries which are recorded using the modified equity method of accounting. The three entities are Heritage Realty Properties Ltd., Vancouver Island Technology Park Trust and GSB Executive Education Inc.

Change in equity in government business enterprises:

	2025	2024
Equity at beginning of year	\$ 1,724	\$ 643
Dividends/distributions paid	(559)	-
Surplus for the year	750	1,081
<b>Equity at end of year</b>	<b>1,915</b>	<b>1,724</b>
Dividends/distributions payable	7,625	7,040
Eliminate gain on property transfer	(4,633)	(4,633)
<b>Investment in government business enterprises</b>	<b>\$ 4,907</b>	<b>\$ 4,131</b>

Condensed financial information of these government business enterprises are as follows:

#### Consolidated Statement of Financial Position

	2025	2024
Assets	\$ 44,075	\$ 43,301
Liabilities	(42,160)	(41,577)
Equity	\$ 1,915	\$ 1,724

# UNIVERSITY OF VICTORIA

## Notes to Consolidated Financial Statements

Year ended March 31, 2025

(tabular figures in thousands of dollars)

### 9. Investments in government business enterprises (continued)

#### Consolidated Statement of Operations

	2025	2024
Revenue	\$ 12,238	\$ 16,464
Expenses	(11,488)	(15,383)
Surplus for the year	\$ 750	\$ 1,081

### 10. Investments in government partnerships

The University is one of five university members of the Western Canadian Universities Marine Sciences Society (WCUMSS) for marine field research. The University provided a grant to the Society in 2025 of \$283,100 (2024 – \$273,400). WCUMSS financial results are proportionately consolidated with those of the University based upon the University's share of its total contributions of 20% (2024 – 20%).

The proportionate amounts included in these consolidated financial statements are as follows:

#### Consolidated Statement of Financial Position

	2025	2024
Financial assets	\$ 233	\$ 309
Liabilities	(432)	(371)
<b>Net debt</b>	(199)	(62)
Non-financial assets	1,419	1,209
<b>Accumulated surplus</b>	\$ 1,220	\$ 1,147

#### Consolidated Statement of Operations

	2025	2024
Revenue	\$ 1,308	\$ 696
Expenses	(1,303)	(860)
Surplus (deficit) for the year	\$ 5	\$ (164)



# UNIVERSITY OF VICTORIA

## Notes to Consolidated Financial Statements

Year ended March 31, 2025

*(tabular figures in thousands of dollars)*

### 11. Accounts payable and accrued liabilities

	2025	2024
Accounts payable and accrued liabilities	\$ 39,475	\$ 30,608
Salaries and benefits payable	9,761	5,337
Accrued vacation pay	13,931	13,788
	\$ 63,167	\$ 49,733

# UNIVERSITY OF VICTORIA

## Notes to Consolidated Financial Statements

Year ended March 31, 2025

(tabular figures in thousands of dollars)

### 12. Deferred contributions

Deferred contributions are comprised of funds restricted for the following purposes:

	2025	2024
Specific purpose (including endowment earnings)	\$ 188,185	\$ 165,486
Research	142,306	125,045
Capital	11,888	16,022
	<b>\$ 342,379</b>	<b>\$ 306,553</b>

	2025				
	Specific Purpose	Research	Capital	Total	2024
Balance, beginning of year	\$ 165,486	\$ 125,045	\$ 16,022	\$ 306,553	\$ 239,460
Contributions and endowment investment income	73,441	157,305	1,694	232,440	252,972
Revenue recognized from deferred contributions	(50,742)	(140,044)	(691)	(191,477)	(184,589)
Transfer to deferred capital contributions	-	-	(5,137)	(5,137)	(1,290)
Balance, end of year	<b>\$ 188,185</b>	<b>\$ 142,306</b>	<b>\$ 11,888</b>	<b>\$ 342,379</b>	<b>\$ 306,553</b>

The balance shown under specific purpose includes accumulated unrealized gains of \$112,187,000 (2024 – \$101,011,000) from endowment investments.

### 13. Deferred capital contributions

Contributions that are restricted for capital are referred to as deferred capital contributions. Amounts are recognized into revenue at the same rate that amortization of the related tangible capital asset is recorded.

Treasury Board provided direction on accounting treatment as disclosed in Note 2(a). Changes in the deferred capital contributions balance are as follows:

	2025	2024
Balance, beginning of year	\$ 528,693	\$ 494,607
Contributions received during the year	107,427	59,468
Transfers from deferred contributions	5,137	1,290
Revenue from amortization of deferred capital contributions	(29,299)	(26,672)
Balance, end of year	<b>\$ 611,958</b>	<b>\$ 528,693</b>

# UNIVERSITY OF VICTORIA

## Notes to Consolidated Financial Statements

Year ended March 31, 2025

(tabular figures in thousands of dollars)

### 14. Debt

Debt reported on the consolidated statement of financial position is comprised of the following (see note 6 (c) for related derivative information):

	2025	2024
Province of British Columbia 4.43% bond due 2053, unsecured, with annual sinking fund payments of \$1,565,000 (Note 14(c))	\$ 104,000	\$ 104,000
Province of British Columbia 4.17% bond due 2054, unsecured (Note 14(c))	18,000	18,000
Royal Bank of Canada 5.38% term loan due 2025, unsecured	-	1,209
Province of British Columbia 3.56% term loan due 2034, unsecured	4,770	5,259
Province of British Columbia 4.82% bond due 2028, unsecured, with annual sinking fund payments of \$327,000	10,800	10,800
Province of British Columbia 4.74% bond due 2039, unsecured, with annual sinking fund payments of \$302,000	10,000	10,000
Great West Life Insurance Company 5.13% term loan due 2030, unsecured	5,078	5,931
Total debt issued	\$ 152,648	\$ 155,199
Unamortized debt discounts (Note 14(c))	(27,207)	(27,718)
Debt	\$ 125,441	\$ 127,481

**UNIVERSITY OF VICTORIA****Notes to Consolidated Financial Statements****Year ended March 31, 2025***(tabular figures in thousands of dollars)***14. Debt (continued)****(a) Principal repayments**

Anticipated annual principal repayments, including sinking fund instalments and maturities, due over the next five years and thereafter are as follows:

	Sinking Fund	Other	Total
2026	\$ 2,194	\$ 1,404	\$ 3,598
2027	2,194	1,470	3,664
2028	2,194	1,538	3,732
2029	1,867	1,610	3,477
2030	1,565	1,685	3,250
Thereafter	35,995	20,141	56,136
	\$ 46,010	\$ 27,848	\$ 73,858

**(b) Sinking Fund Investments**

Sinking fund investments are held and invested by the Province of British Columbia. These funds totaling \$17,976,000 (2024 – \$14,696,000) will provide for the retirement at maturity of \$124,800,000 of debt issued to the Province. The amount forms part of the portfolio investments balance shown on the Consolidated Statement of Financial Position.

# UNIVERSITY OF VICTORIA

## Notes to Consolidated Financial Statements

Year ended March 31, 2025

(tabular figures in thousands of dollars)

### 15. Asset Retirement Obligations

The University owns and operates buildings that are known to contain asbestos and other hazardous materials, which represents a health hazard when undergoing certain repairs and maintenance work and upon demolition of the building. As there is a legal obligation to remove hazardous materials, the University has recognized a liability relating to the removal and post-removal care of the asbestos and other hazardous materials in these buildings. Such estimated costs have been discounted to the present value using a discount rate of 3.60% per annum (2024 - 3.49%).

Changes to the asset retirement obligations in the year are as follows:

	2025	2024
Balance, beginning of year	\$ 53,712	\$ 48,829
Accretion expense	2,105	1,528
Changes in assumptions	2,192	3,355
Balance, end of year	\$ 58,009	\$ 53,712

# UNIVERSITY OF VICTORIA

## Notes to Consolidated Financial Statements

Year ended March 31, 2025

(tabular figures in thousands of dollars)

### 16. Tangible capital assets

	Balance as at March 31, 2024	Additions	Disposals	Balance as at March 31, 2025
<b>Cost</b>				
Land	\$ 20,364	\$ -	\$ -	\$ 20,364
Site improvements	62,040	2,745	-	64,785
Buildings	1,230,878	82,901	-	1,313,779
Equipment and furnishings	191,406	36,089	(17,995)	209,500
Information systems	18,441	-	-	18,441
Computer equipment	11,632	5,327	(4,752)	12,207
Library holdings	28,494	978	(3,329)	26,143
<b>Total</b>	<b>\$ 1,563,255</b>	<b>\$ 128,040</b>	<b>\$ (26,076)</b>	<b>\$ 1,665,219</b>
	Balance as at March 31, 2024	Disposals	Amortization	Balance as at March 31, 2025
<b>Accumulated amortization</b>				
Site improvements	\$ 28,310	\$ -	\$ 1,774	\$ 30,084
Buildings	360,987	-	25,548	386,535
Equipment and furnishings	92,134	(17,995)	19,491	93,630
Information systems	18,441	-	-	18,441
Computer equipment	8,303	(4,752)	2,808	6,359
Library holdings	17,880	(3,329)	2,397	16,948
<b>Total</b>	<b>\$ 526,055</b>	<b>\$ (26,076)</b>	<b>\$ 52,018</b>	<b>\$ 551,997</b>
<b>Net book value</b>		<b>March 31,</b>	<b>March 31,</b>	
			2024	
Land		\$ 20,364	\$ 20,364	
Site improvements		34,701	33,730	
Buildings		927,244	869,891	
Equipment and furnishings		115,870	99,272	
Computer equipment		5,848	3,329	
Library holdings		9,195	10,614	
<b>Total</b>		<b>\$ 1,113,222</b>	<b>\$ 1,037,200</b>	

# UNIVERSITY OF VICTORIA

## Notes to Consolidated Financial Statements

Year ended March 31, 2025

(tabular figures in thousands of dollars)

### 16. Tangible capital assets (continued)

- (a) Contributed tangible capital assets:

Additions to equipment and furnishings include the following contributed tangible capital assets:

	2025	2024
Equipment and furnishings	\$ 519	\$ 250

- (b) Assets under construction

Assets under construction comprised of buildings having a value of \$87,973,000 (2024 – \$38,711,000) and equipment having a value of \$26,427,000 (2024 – \$26,362,000) have not been amortized. Amortization of these assets will commence when the asset is available for productive use.

- (c) De-recognition of tangible capital assets

The de-recognition of tangible capital assets during the year had an original cost of \$26,076,000 (2024 – \$40,978,000) and related to fully amortized assets with a net book value of \$nil (2024 – \$nil).

- (d) Interest capitalized during construction

The University capitalized interest during the year of \$nil (2024 - \$190,000 related to the construction of the Student Housing and Dining (SHD) project).

### 17. Financial risk management

The University has exposure to the following risks from its use of financial instruments: credit risk, price risk and liquidity risk. The Board of Governors ensures that the University has identified major risks and management monitors and controls them.

- (a) Credit risk

Credit risk is the risk of financial loss to the University if a customer or counterparty to a financial instrument fails to meet its contractual obligations. Such risks arise principally from the amounts receivable and from fixed income assets held by the University.

The University manages amounts receivable by using a specific bad debt provision when management considers that the expected recovery is less than the account receivable.

The entity is exposed to credit risk through its accounts receivable from students. This risk is managed by limiting the extent of credit granted to students and by monitoring the collection of receivables.

# UNIVERSITY OF VICTORIA

## Notes to Consolidated Financial Statements

Year ended March 31, 2025

(tabular figures in thousands of dollars)

### 17. Financial risk management (continued)

#### (a) Credit risk (continued)

The University limits the risk in the event of non-performance related to fixed income holdings by dealing principally with counter-parties that have a credit rating of A or higher as rated by the Dominion Bond Rating Service or equivalent. The credit risk of the University investments at March 31, 2025 is \$400,336,000 (2024 – \$349,005,000).

The following shows the percentage of fixed income holdings in the portfolio by credit rating:

Credit Rating	%
AAA	9.7%
AA	6.9%
A	6.2%
BBB	8.3%
BB and below	1.7%
Mortgages	13.3%
Foreign exchange	0.1%
Cash and short-term	
R1 high	24.6%
R1 mid	0.4%
R1 low	28.8%
	100.0%

#### (b) Price risk

Price risk includes market risk and interest rate risk.

Market risk relates to the possibility that the investments will change in value due to fluctuations in market prices. The objective of market risk management is to mitigate market risk exposures within acceptable parameters while optimizing the return on risk. This risk is mitigated by the investment policies for the respective asset mixes to be followed by the investment managers, the requirements for diversification of investments within each asset class and credit quality constraints on fixed income investments. Market risk can be measured in terms of volatility, i.e., the standard deviation of change in the value of a financial instrument within a specific time horizon.



# UNIVERSITY OF VICTORIA

## Notes to Consolidated Financial Statements

Year ended March 31, 2025

(tabular figures in thousands of dollars)

### 17. Financial risk management (continued)

#### (b) Price risk (continued)

Based on the volatility of the University's current asset class holdings, the net impact on market value of each asset class is shown below.

Asset Class		Estimated Volatility (% change)
Short Term Bonds	+/-	2.4%
Mortgages	+/-	2.9%
Corporate Bonds	+/-	4.7%
Universe Bonds	+/-	5.2%
Canadian equities	+/-	16.9%
Global equities	+/-	14.2%
Real estate	+/-	8.0%
Infrastructure	+/-	12.2%
Private equity	+/-	28.1%
Benchmark for Investments		Net Impact on Market Value
FTSE Canada Short Term Bond Index	+/-	\$ 933
FTSE Canada Short Term Bond Index	+/-	1,626
FTSE Canada All Corporate Bond Index	+/-	1,087
FTSE Canada Universe Bond Index	+/-	3,925
S&P/TSX Composite index	+/-	393
MSCI All Country World Index	+/-	50,105
MSCI/REALPAC Canada Quarterly Property Fund Index	+/-	4,579
Canadian Consumer Price Index (Infrastructure)	+/-	10,106
Canadian Consumer Price Index (Private Equity)	+/-	2,433

Interest rate risk is the risk that the fair value of future cash flows of a financial instrument will fluctuate because of changes in the market interest rates. The value of fixed-income and debt securities, such as bonds, debentures, mortgages or other income-producing securities is affected by interest rates. Generally, the value of these securities increases if interest rates fall and decreases if interest rates rise.

It is management's opinion that the University is exposed to market or interest rate risk arising from its financial instruments. Duration is an appropriate measure of interest rate risk for fixed income funds as a rise (fall) in interest rates will cause a decrease (increase) in bond prices; the longer the duration, the greater the effect. Duration is managed by the investment manager at the fund level. At March 31, 2025, the modified duration of all fixed income in aggregate was 2.3 years. Therefore, if interest rates were to increase by 1% across all maturities, the value of the bond portfolio would drop by 2.3%; contrarily, if interest rates were to decrease by 1% across all maturities, the value of the bond portfolio would increase by 2.3%.

# UNIVERSITY OF VICTORIA

## Notes to Consolidated Financial Statements

Year ended March 31, 2025

(tabular figures in thousands of dollars)

### 17. Financial risk management (continued)

#### (b) Price risk (continued)

The University's debt is fixed rate; accordingly, changes in interest rates do not impact interest payments but may impact the fair value of such debt and the fair value of related derivatives (interest rate swaps on debt). The University uses interest rate swaps to lock in interest rates on future debt issues to protect against rising interest rates.

#### (c) Liquidity risk

Liquidity risk is the risk that the University will not be able to meet its financial obligations as they become due. The University manages liquidity risk by continually monitoring actual and forecasted cash flows from operations and anticipated investing and financing activities to ensure, as far as possible, that it will always have sufficient liquidity to meet its liabilities when due, under both normal and stressed conditions, without incurring unacceptable losses or risking damage to the University's reputation.

### 18. Accumulated surplus

Accumulated surplus is comprised of the following:

	2025	2024
Endowments	\$ 470,829	\$ 455,457
Invested in tangible capital assets	340,868	347,941
Internally restricted	135,520	116,907
Unrestricted	18,082	13,309
Accumulated remeasurement gains	10,412	7,301
	<b>\$ 975,711</b>	<b>\$ 940,915</b>

Endowments consist of restricted donations and capitalized investment income to be held in perpetuity.

Invested in tangible capital assets consist of unrestricted funds previously spent on capital assets, debt repayment, and asset retirement obligations.

Internally restricted funds consist of balances set aside or appropriated by the Board of Governors for equipment replacement, capital improvements and other non-recurring expenditures.

Unrestricted funds consist primarily of balances arising from the University's ancillary and specific purpose funds, and consolidated entities.

# UNIVERSITY OF VICTORIA

## Notes to Consolidated Financial Statements

Year ended March 31, 2025

(tabular figures in thousands of dollars)

### 19. Endowments

Changes to the endowment principal balances, not including remeasurement gains/losses, (see note 12 for accumulated unrealized gains/ losses on restricted endowment investments) are as follows:

	2025	2024
Balance, beginning of year	\$ 455,457	\$ 436,144
Contributions received during the year	4,736	6,288
Invested income and donations capitalized	10,636	13,025
<b>Balance, end of year</b>	<b>\$ 470,829</b>	<b>\$ 455,457</b>

The balance shown does not include endowment principal with fair value of \$8,656,000 (2024 – \$8,413,000) and book value of \$4,820,000 (2024 – \$4,820,000) held by the Vancouver Foundation. The excluded principal is not owned or controlled by the University, but income from it is paid to the University to be used for specific purposes.

### 20. Contractual rights

The University may, from time to time, enter into contracts or agreements in the normal course of operations that result in future assets or revenue. One example of such agreements is multi-year research funding agreements, whereby the University has the opportunity to earn revenue in future years by incurring qualified expenditures. These funding agreements do not abnormally impact the University's financial position and do not guarantee the university the right to future funding.

### 21. Contractual obligations

The nature of the University's activities can result in multiyear contracts and obligations whereby the University will be committed to make future payments. Significant contractual obligations related to operations that can be reasonably estimated are as follows:

	2026	2027	2028	2029	2030
Construction contracts	\$ 80,919	\$ 14,580	\$ 37	\$ -	\$ -
Operating leases	1,605	1,394	1,287	252	100
<b>Total</b>	<b>\$ 82,524</b>	<b>\$ 15,974</b>	<b>\$ 1,324</b>	<b>\$ 252</b>	<b>\$ 100</b>

## UNIVERSITY OF VICTORIA

### Notes to Consolidated Financial Statements

Year ended March 31, 2025

(tabular figures in thousands of dollars)

#### 22. Contingent liabilities

The University may, from time to time, be involved in legal proceedings, claims, and litigation that arise in the normal course of business. It is management's opinion that the aggregate amount of any potential liability is not expected to have a material adverse effect on the University's financial position or results.

The University is one of 58 Canadian university subscribers to CURIE, which has provided property and liability insurance coverage to most campuses other than Quebec and Prince Edward Island since 1988. The anticipated cost of claims based on actuarial projections is funded through member premiums. Subscribers to CURIE have exposure to premium retro-assessments should the premiums be insufficient to cover losses and expenses.

#### 23. Expenses by object

The following is a summary of expenses by object:

	2025	2024
Salaries and wages	\$ 440,665	\$ 416,797
Employee benefits	75,261	75,688
Travel	18,861	17,306
Supplies and services	107,777	103,388
Equipment rental and maintenance	11,225	9,880
Utilities	8,252	9,050
Scholarships, fellowships and bursaries	61,599	56,688
Cost of goods sold	10,751	10,591
Interest on long-term debt	5,572	5,574
Amortization of tangible capital assets	52,018	48,661
	\$ 791,981	\$ 753,623

#### 24. Trusts under administration

##### (a) University of Victoria Long-Term Disability Trust

The University administers an employee-funded long-term disability plan for faculty and administrative and academic professional staff. The University does not contribute to or control the plan. The long-term disability plan's assets and liabilities have not been included in the consolidated statement of financial position. The plan's operations have not been included in the consolidated statement of operations and accumulated surplus.

# UNIVERSITY OF VICTORIA

## Notes to Consolidated Financial Statements

Year ended March 31, 2025

(tabular figures in thousands of dollars)

### 24. Trusts under administration (continued)

#### (a) University of Victoria Long-Term Disability Trust (continued)

As of March 31, 2025, the balances of the long-term disability plan are as follows:

	2025	2024
Assets	\$ 25,674	\$ 23,260
Accrued benefit obligation	(38,184)	(33,467)
	\$ (12,510)	\$ (10,207)

#### (b) Funds held in trust

Funds held in trust are funds held on behalf of autonomous organizations, agencies, and student societies having a close relationship with the University. These funds are not reported on the University's consolidated statement of financial position (2025 – \$541,000; 2024 – \$2,236,000).

### 25. Supplemental cash flow information

	2025	2024
Cash paid for interest	\$ 5,099	\$ 4,919

### 26. Related party transactions

The University is related through common control to all Province of British Columbia ministries, agencies, school districts, health authorities, colleges, universities, and crown corporations. Transactions with these entities, unless disclosed separately, are considered to be in the normal course of operations and are recorded at the exchange amount. The university accounts for its controlled entities, government business enterprises and government partnerships as outlined in Note 2(b). During the year ended March 31, 2025, there have been no material transactions between the University and its key management personnel or their close family members.

### 27. Comparative information

Certain 2024 comparative information has been reclassified to conform to the presentation adopted in the current year.

**UNIVERSITY OF VICTORIA**  
**SCHEDULE OF CHANGES IN APPROPRIATED EXPENDABLE FUNDS**

FUND ACCOUNTING -STATEMENT 2  
(Prepared without audit)

Year ended March 31, 2025 (in thousands of dollars)

	Balance at beginning of year	Released to meet expenditures	Additions and/ or transfers during year	Balance at end of year
<b>GENERAL OPERATING FUND</b>				
Equipment				
Printing and duplicating	365	-	16	381
Network services	3,223	1,724	1,549	3,048
Other departments	13,438	1,867	1,817	13,388
Capital and renovation projects	4,038	234	331	4,135
Academic and administrative program development and operation support	16,678	4,035	17,170	29,813
Research support	30,238	7,307	6,713	29,644
Student assistance and financial aid	7,828	959	1,669	8,538
Employee obligations, training and support	29,680	2,808	1,211	28,083
Information technology and technical support	2,710	652	739	2,797
Other commitments	4,153	778	727	4,102
Contingency	14,800	2,256	1,412	13,956
Externally funded Island Medical Program	6,858	1,877	1,147	6,128
Insurance and utilities	7,899	-	1,068	8,967
Library prepaid expenses	3,300	3,619	3,719	3,400
	145,208	28,116	39,288	156,380
<b>ANCILLARY ENTERPRISES FUND</b>				
Equipment replacement and capital improvements				
Bookstore	763	147	-	616
Food services	-	-	-	-
Residence services	11,339	1,479	-	9,860
Parking services	11,068	-	920	11,988
Childcare	113	-	188	301
Heritage Realty Properties	530	-	-	530
	23,813	1,626	1,108	23,295
<b>CAPITAL FUND</b>				
Plant Assets funded to/from Appropriations				
Capital reserve	46,449	3,134	-	43,315
Student Housing and Dining	(81,618)	-	31,587	(50,031)
Centre for Athletic Recreation and Special Abilities	(16,567)	-	638	(15,929)
Others	(14,735)	8,772	1,675	(21,832)
	(66,471)	11,906	33,900	(44,477)
<b>TOTAL APPROPRIATED EXPENDABLE FUNDS</b>	<b>102,550</b>	<b>41,648</b>	<b>74,296</b>	<b>135,198</b>
<b>2024 COMPARATIVE</b>	<b>78,851</b>	<b>25,300</b>	<b>48,999</b>	<b>102,550</b>



# 2024/25 FINANCIAL REPORT



University  
of Victoria

MARCH 31, 2025





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We acknowledge and respect the Ləkʷəŋən (Songhees and Xʷsepsəm/Esquimalt) Peoples on whose territory the university stands, and the Ləkʷəŋən and ƳSÁNEĆ Peoples whose historical relationships with the land continue to this day.





## Message from the President

The University of Victoria's Strategic Plan, *Distinctly UVic: A Strategy for the University of Victoria*, forms a roadmap for the future we want to create. Along with fostering a culture of change and partnership to solve the urgent challenges of our time, *Distinctly UVic* hold us accountable to ʔetalnəwəl | ÁTOL, NEUEL by respecting the rights of one another, being in right relationship with all things, and by upholding the rights of Indigenous Peoples. Our strategic plan, along with complimentary plans like our Indigenous plan Xʷkʷənəŋ istəl W̱ÇENENISTEL: Helping to move each other forward, *Aspiration 2030: UVic Research and Creative Works Strategy* and our *Climate & Sustainability Action Plan 2030 (CSAP)*, among others, sets our priorities and guides our decision-making through turbulent financial times.

In alignment with these plans, we are continuing to focus on supporting our community and advancing our academic mission. We recently completed two student housing buildings—Čeqʷəŋín ʔéʔləŋ (Cheko'nien House) and Snéqə ʔéʔləŋ (Snequ House)—and were honoured that Songhees and Xʷsepsəm/Esquimalt Nations have given us permission to use Ləkʷəŋən names to situate them in the language and history of the People and their land. We are currently developing plans for 500 more residence beds on campus to address student demand and help relieve pressure on the housing market in the greater community.

In these challenging financial times, the university collectively made tough decisions to adjust our budgets to reflect the changing enrolment environment. These decisions have positioned us to project a balanced budget moving into fiscal 2025/26 and ensured we complied with legislation that requires us to not have a financial deficit. While in a financially constrained environment, we have been able to advance many institutional priorities, such as upgrading UVic's Arbutus, Canada's largest cloud computing site, to increase its computing power and make it more sustainable. We are also moving forward with electrifying our District Energy Plant to reach our emissions goal years ahead of the target set out in CSAP. Another notable priority was the approval of UVic's first new faculty in 30 years: The Faculty of Health officially started May 1, 2025, and will help the province meet its growing health-care needs. I am grateful to the entire university community for advancing the vision set out in our institutional plans and look forward the future we create together.

Dr. Kevin Hall  
President and Vice-Chancellor



## Message from the Vice-President, Finance and Operations

I am pleased to present UVic's Annual Financial Report for 2024/25. Along with many other post-secondary institutions in B.C. and Canada, national and global factors continue to create pressure and uncertainty with our enrolment and budget outlook. Our priority, as we diversify enrolments and position ourselves for the future in alignment with our strategic plans, is to deliver quality education and innovative research.

Our domestic enrolment has recovered following a decline in 2022/23 and is at its highest level to date. In contrast to the positive domestic outlook, we are graduating more international students than we are able to recruit due to many contributing and ongoing external factors, including a federal cap on international student visa permits, changes to study permit requirements, increased competition globally, and geopolitical factors and diplomatic disputes that may be impacting international interest. Despite these challenges, we achieved our enrolment targets for the 2024/25 fiscal year due to significant investments in and focus on recruitment efforts.

The decrease in international enrollment, from a financial perspective, reduced tuition revenue over the last two years and we continue to expect lower levels in the coming fiscal year. This loss in international tuition revenue was partially offset by increased domestic and non-credit tuition due to strong enrolments. While budgets for 2024/25 were reduced to reflect anticipated reductions in overall tuition revenue, year over year expenses increased mostly due to increases in salaries and associated benefits resulting from collective agreements as well as increases in scholarships, fellowships and bursaries. As required under the University Act, the university ended the year with a modest operating surplus. Overall, because of the planning and budget work over the last two years, the financial health indicators outlined in this document reflect a generally stable picture of UVic's financial position.

Through another challenging financial year, we are grateful for work undertaken by our campus leaders to respond to the enrolment challenge and to the dedication, creativity and resilience of our faculty, staff and students.

Kristi Simpson  
Vice-President Finance and Operations



# Fast Facts

**22,000+**

students

**162,500+**

alumni

**5,000+**

employees,  
including

**580+**

patents

**169**

start-up  
companies

**900+**

full time faculty

**1,145+**

invention disclosures

**Top 1%** in the world for  
global impact

Source: 2024 Times Higher Education Impact Ranking

**\$808.3** million

total revenues

**#1** in North America for  
international collaboration

Source: Leiden, 2023

**\$2.2** billion

total assets

**#1** in Canada for promoting  
Indigenous visibility

Source: Maclean's, 2022

**\$610.3** million

endowment market value

## About the University of Victoria

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Located on Ləkʷəŋən (Songhees and Xwsepsəm/Esquimalt) territory in the city of Victoria, British Columbia, the University of Victoria (the university, UVic) is one of Canada's leading research-intensive universities. UVic's student enrollment is over 22,000 (graduate and undergraduate) and the university employs more than 5,000 people, including 900 full-time faculty. At UVic, we offer more than 280 undergraduate and graduate programs as well as a wide range of degrees, diplomas and campus services. UVic operates under the authority of the University Act of British Columbia and in accordance with the mandate provided by the Ministry of Post-Secondary Education and Future Skills (the Province, Ministry). UVic's finances and administration are overseen by a Board of Governors and the university's academics are governed by the Senate.

The university annually develops a Planning and Budget Framework (P&BF), which is informed by UVic's institutional plans. The P&BF and associated financial models are developed within the context of a three-year planning cycle, which provides a more realistic time frame for the development of university initiatives and allows for greater flexibility than permitted within an annual process.

## Financial Reporting Environment

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UVic is part of the Government Reporting Entity (GRE) of the Province of B.C. and, as such, is required to present its financial statements in accordance with Section 23.1 of the *Budget Transparency and Accountability Act* supplemented by directives set out by the Province. The attached financial statements present the financial results of the university for the year ended March 31, 2025, in accordance with Public Sector Accounting Standards (PSAS). These statements are the consolidation of all university operations, including the results of general operations, ancillary operations, capital projects, endowment returns and spending, research grants and expenditures, etc. As required by PSAS, they also include the financial results of each of the university's 12 external entities as well as the staff pension plan. While these entities are required to be included in the financial statements, their assets are restricted for specific purposes (e.g., pension) and therefore are not available to support general operations of the university.

The Province has directed that Public Sector Accounting Standards be adopted without the PS4200 not-for-profit elections and that all restricted contributions received for acquiring tangible capital assets be deferred as Deferred Capital Contributions and recognized in revenue at the same rate that the amortization of the related tangible capital asset is recorded. More information on accounting policies are described in note 2 of the financial statements.

## Operating Environment

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The environment and financial outlook for post-secondary education in Canada is constrained due to enrolments and funding models. Across Canada, most institutions have seen a decline in undergraduate international student registrants and have experienced an associated loss of revenue resulting in budget pressures across the country.

UVic's revenue primarily comes from two sources: domestic and international tuition and an operating grant from the Province of British Columbia. The provincial operating grant supports credit courses for eligible students, based on targets set by the Ministry for full-time domestic undergraduates, graduates, and co-op students. Overall operating revenue grew as funding from the provincial government increased due to funding for collectively bargained salary and benefits increases and funded enrolment for the technology expansion in software engineering and computer science programs.

At UVic, we achieved our 2024/25 enrolment targets set with the Board of Governors in March 2024 and continue to prioritize stabilizing international enrolment and other revenue generation initiatives. Our domestic enrolment has recovered following a decline in 2022/23 and is at its highest level to date. This recovery is a result of investments in entrance scholarships, making earlier admission offers, and significant recruitment efforts within the faculties and in the Division of Student Affairs. Graduate enrolment was on target in line with previous years, thanks in part to our research reputation and the quality of our faculty and graduate programs. The Province limits annual tuition increases for domestic students to 2%, which is lower than our annual inflation costs estimated at over 5% over the last 3 years.

Unlike domestic tuition rates that are set by the Province, international tuition rates are shaped by the global market. In addition, the Ministry introduced an international education framework that includes a tuition fee setting approach that includes transparency on the full cost of a student's degree program. As a result, UVic updated its fee setting process to approve international undergraduate tuition fees earlier in the recruitment cycle so incoming students know their fees in advance and can plan accordingly. International undergraduate tuition fees are now set in June of the previous year for each program of study along with a capped inflationary increase of 4% annually in each subsequent year of that degree program. This provides cost certainty to students over the course of their degree.

In January 2024, the federal government introduced a cap on international student visa permits. This change along with political and other tensions world-wide has impacted

international enrolment across the country. For 2024/25, given the external environment we anticipated and set realistic enrolment and corresponding budget targets, which we achieved. Significant work was put into recruitment with a focus on undergraduate international recruitment to meet these targets. We will continue to carefully monitor student enrolment levels into the future so we can respond to enrolment changes and minimize institutional impacts.

Additional revenue sources are restricted for specific purpose, such as research and capital as outlined in note 12, deferred contribution. Donor and corporate contributions support scholarships, bursaries, and specific projects, with such funds restricted to the purposes defined by the donor. Research funding varies year to year depending on sponsor priorities and the success of UVic's proposals.

UVic is required to run an annual surplus. It has two components: the unrestricted surplus or deficit from operations (teaching, research, and community engagement), and restricted surplus from net endowment contributions. The university's endowment fund allows for perpetual investment, with a portion of annual income made available for spending while the rest is reinvested for long-term growth. Part of the unrestricted surplus can, and is, invested in capital assets, but UVic does not have the financial capacity to solely fund major capital projects due to the high costs of maintaining and building the physical infrastructure. Instead, it relies on a mix of funding sources, including provincial and federal governments and private donors. The Ministry also provides an annual grant to support deferred maintenance, supplemented by UVic's own contributions. While this funding is critical and is utilized to address some deferred maintenance, UVic's physical infrastructure continues to require renewal and enhancement. To address program requirements, two significant capital projects are underway – the National Centre for Indigenous Laws and the Engineering and Computer Science expansion projects. Both projects will provide key space to support teaching and research capacity. Future capital priorities have been identified in the 5-Year Capital Plan and include addressing deferred maintenance, increasing student housing, enhancing or repurposing current spaces, and increasing academic and research space for those areas with the greatest pressures.

UVic operates in an increasingly more complex environment with many factors that are outside of the university's control. The university uses an Enterprise Risk Management approach and develops risk mitigation strategies to reduce the impact where possible. More information on the major risks that can affect the university from a financial perspective are outlined in [UVic's Planning and Budget Framework](#).



## Highlights of Financial Health

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At the end of fiscal 2024/25, UVic's:

- Endowment grew \$29.4 million to reach a market value of \$610.3 million
- Annual Surplus from operations increased \$8.1 million to reach \$16.3 million (2% of revenue)
- Consolidated revenue increased by \$46.5 million to reach \$808.3 million
- Consolidated expenses increased by \$38.3 million to reach \$792.0 million
- Consolidated assets increased \$200 million to reach \$2.2 billion

## CAUBO Financial Health Indicators

The University of Victoria's financial sustainability can be assessed using the Canadian Association of University Business Officers' (CAUBO) four indicators of financial health:

- Net Income/Loss Ratio
- Primary Reserve Ratio
- Interest Burden Ratio
- Viability Ratio

These indicators are metrics to be used for assessing UVic's resilience and ability to withstand financial challenges based on guidance from CAUBO. CAUBO provided direction on which indicator should be used nationally; however, CAUBO members follow a variety of accounting standards by province. Changes in accounting standards at the institutional, provincial, or national level may lead to year over year fluctuations in financial ratios. The indicators serve as an important starting point for analysis.

Ratios have been prepared on an all-funds basis meaning that they are based on universities' total financial results rather than focusing solely on the operating fund. As a result, the financial picture presented may differ from what institutions are accustomed to seeing in their internal financial statements.

UVic's Net Income/Loss ratio is 1.4% (2024 – 0.7%). The Net Income/Loss ratio measures the percentage of an institution's revenues that contribute to its net assets. The objective of the ratio is to track trends in an institution's net earnings. CAUBO guidance suggests a ratio above 1.5% indicates a favorable level of surplus capable of reinvestment in institutional initiatives.



UVic's Primary Reserve Ratio is 54.47 (2024 – 48.59). The Primary Reserve Ratio provides an indication of how long an institution could continue to operate using only its resources that can be expended without restrictions. The ratio compares expendable net assets to total unrestricted expenses and helps to answer whether the university's resources are sufficient and flexible enough to support its mission. CAUBO guidance suggests a ratio of 40 implies that the institution could cover approximately five months of expenses.

UVic's Interest Burden Ratio is 0.7% (2024 – 0.8%). The Interest Burden Ratio compares the level of current debt service with the institution's total expenses. It is an indicator of the institution's dependence on borrowed funds as a source of financing its mission. CAUBO guidance suggest a ratio below 2% indicates a low reliance on debt.

UVic's Viability Ratio is 0.95 (2024 – 0.79). The Viability Ratio measures the availability of expendable net assets to cover debt if the institution needed to settle its obligations immediately. It helps to answer whether resources, including debt, are being managed strategically to advance the university's mission. CAUBO guidance suggests a viability ratio above .6 indicates a favourable ability to respond to adverse conditions.

Overall, the financial health indicators reflect a generally stable picture of UVic's financial position. The net income/loss ratio reflects the provincial context that requires UVic run an annual net income operating surplus. The interest burden ratio reflects UVic is managing its debt obligations prudently. The primary reserve ratio decline year over year suggests a slightly reduced capacity to cover expenses using unrestricted, expendable resources. However, the decline is modest and does not indicate an urgent liquidity risk. The viability ratio decline implies a diminished ability to cover outstanding debt with available resources in the short term; however, UVic's debt levels remain manageable, reflected by the interest burden ratio.

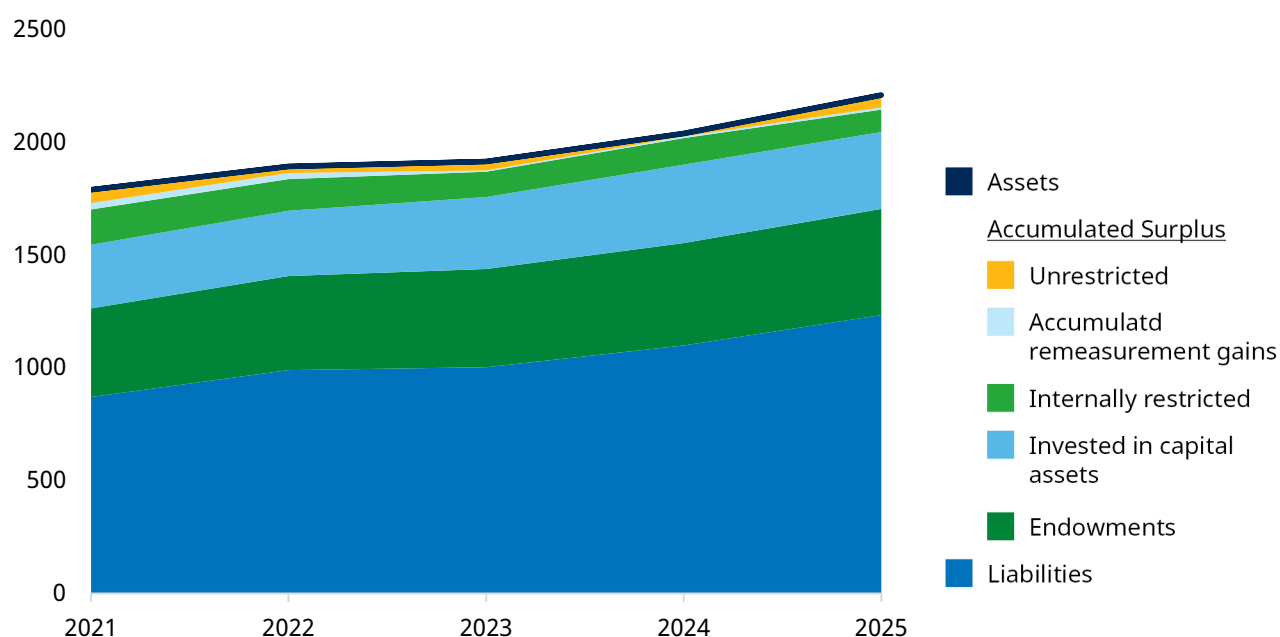
## Financial Information

### Consolidated Statement of Financial Position

The university's consolidated statement of financial position shows UVic's ability to cover existing liabilities and endowments as well as finance future operations by comparing financial assets to liabilities through the net financial asset (debt) indicator. It also considers the university's non-financial assets to determine UVic's overall financial position.

#### Consolidated Financial Position

*in millions of dollars*



#### Consolidated Assets

<i>In thousands of dollars</i>	2025	2024	Variance \$	Variance %
<b>Financial Assets</b>				
Cash and cash equivalents	213,714	175,040	38,674	22.1%
Accounts receivable	18,770	19,526	(756)	-3.9%
Due from governments	27,707	20,040	7,667	38.3%
Inventories for resale	1,399	1,415	(16)	-1.1%
Portfolio investments	250,241	232,564	17,677	7.6%
Derivatives		88	(88)	-100.0%
Loans receivable	33,780	33,321	459	1.4%

Employee future benefits	44,641	36,677	7,964	21.7%
Investments in gov't business enterprises	4,907	4,131	776	18.8%
<b>Non-Financial Assets</b>				
Tangible capital assets	1,113,222	1,037,200	76,022	7.3%
Restricted endowment investments	470,829	455,457	15,372	3.4%
Inventories held for use	2,560	3,461	(901)	-26.0%
Prepaid expense	30,358	23,908	6,450	27.0%
<b>Total Consolidated Assets</b>	<b>2,212,128</b>	<b>2,042,828</b>	<b>169,300</b>	<b>8.3%</b>

UVic's assets consist of financial assets, which are available to discharge existing liabilities or finance future operations, and non-financial assets, such as land and buildings.

UVic's consolidated assets total \$2.2 billion as outlined in the table above. UVic's consolidated assets grew primarily because of growth in tangible capital assets from investments in new buildings and infrastructure renewal, an increase in cash and cash equivalents, and an increase in portfolio investments due to strong financial markets.

Cash and cash equivalents increased due to optimizing investment income with higher short-term yields. The decrease in due from governments reflects timing differences and year end funding. Portfolio investments include the university's working capital, investments underlying endowment expendable funds, investments related to sinking funds held for provincial debt, and supplemental pension obligations. The increase in portfolio investments is largely due to strong performance within the UVic Foundation's endowment investments and the university's working capital.

Employee future benefits represent a future asset for the Staff Pension Plan and liabilities for supplemental pension obligations, vested sick leave entitlements, and group life insurance plans. Investments in government business enterprises represent the equity held in controlled business operations of Heritage Realty Properties Ltd., the Vancouver Island Technology Park (VITP) Trust, and GSB Executive Education Inc.

Tangible capital assets include land, buildings, site improvements, library holdings, computers, equipment, and furnishings but excludes \$12.2 million of artwork and collections, as these are expensed under PSAS accounting. The net increase in tangible capital assets is largely due to the capital asset addition of Engineering Expansion and National Centre for Indigenous Laws.

## Liabilities

<i>In thousands of dollars</i>	2025	2024	Variance	Variance %
<i>Accounts payable and accrued liabilities</i>	63,167	49,733	13,434	27.0%
<i>Derivatives</i>	157		157	
<i>Due to governments</i>	8,940	8,750	190	2.2%
<i>Deferred revenue</i>	26,366	26,991	(625)	-2.3%
<i>Deferred contributions</i>	342,379	306,553	35,826	11.7%
<i>Deferred capital contributions</i>	611,958	528,693	83,265	15.7%
<i>Debt</i>	125,441	127,481	(2,040)	-1.6%
<i>Asset retirement obligations</i>	58,009	53,712	4,297	8.0%
<b>Total Liabilities</b>	<b>1,236,417</b>	<b>1,101,913</b>	<b>134,504</b>	<b>12.2%</b>

UVic's liabilities include deferred contributions, which are externally restricted revenue that is not recognized until related expenses are incurred (e.g., research grants) and deferred capital contributions, which are externally restricted contributions for investment in capital assets amortized over the life of the related tangible capital assets. UVic's liabilities total \$1.2 billion as outlined in the table above.

Deferred contributions increased for both specific purpose funds related to endowment investments and research as outlined in note 12. During the year, deferred capital contributions increased \$83 million because of contributions for capital of \$118 million, less amortization. Debt decreased due to regular debt repayments. Asset retirement obligations related to buildings containing asbestos and other hazardous materials increased due to inflation and a revaluing of the asset retirement obligation as at March 31, 2025.

## Accumulated Surplus

<i>In thousands of dollars</i>	2025	2024	Variance \$	Variance %
Unrestricted	18,082	13,309	4,773	35.9%
Remeasurement gains	10,412	7,301	3,111	42.6%
Internally restricted	135,520	116,907	18,613	15.9%
Invested in capital assets	340,868	347,941	(7,073)	-2.0%
Endowments	470,829	455,457	15,372	3.4%
<b>Accumulated surplus</b>	<b>975,711</b>	<b>940,915</b>	<b>34,796</b>	<b>3.7%</b>

Accumulated surplus represents the university's residual interest in its assets after deducting liabilities (net assets). It increased to \$976 million, which mostly represents restricted, spent or committed funds.

The majority of accumulated surplus is unavailable to fund operations as it is either restricted or has already been used to invest in buildings, equipment and other capital assets. Endowments are described in the following section. Unrestricted surplus consists primarily of balances arising from ancillary operations such as student housing and other entities that are consolidated in the Financial Statements (see related entities below). Remeasurement gains represent unrealized gains on university unrestricted or quasi endowment funds and the university's working capital arising after April 1, 2012

### **Internally Restricted Surplus**

<i>In thousands of dollars</i>	<b>2025</b>	<b>2024</b>	<b>Variance \$</b>	<b>Variance %</b>
General operating	156,380	145,208	11,172	7.7%
Ancillary enterprises	23,295	23,813	(518)	-2.2%
Vacation pay and staff pension	44,492	36,727	7,765	21.1%
Capital	(88,647)	(88,841)	194	-0.2%
<b>Total internally restricted</b>	<b>135,520</b>	<b>116,907</b>	<b>18,613</b>	<b>15.9%</b>

Internally restricted surplus consists of balances set aside or appropriated by the Board of Governors for equipment replacement, capital improvements, and other nonrecurring expenditures. Internally restricted surplus increased during the year due to appropriations from the general operating fund as well as an increase in the staff pension plan asset.

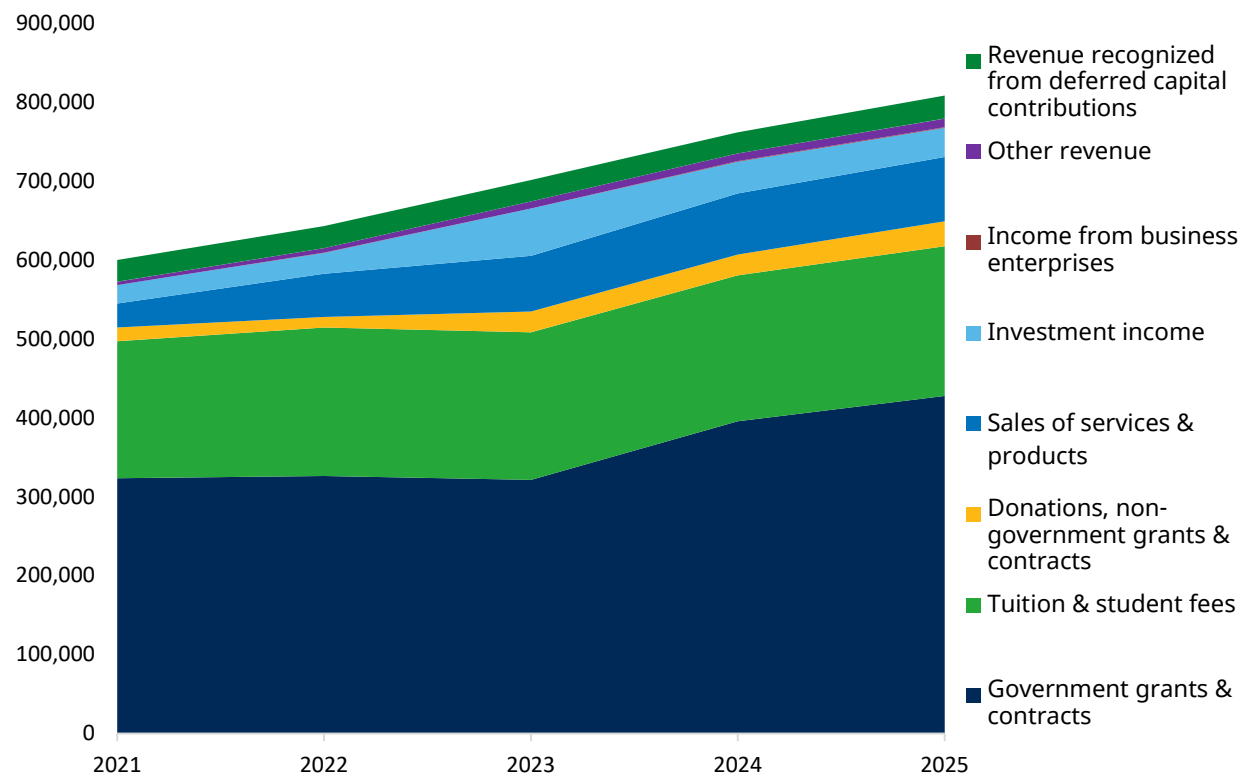
## Consolidated Statement of Operations and Accumulated Surplus

### Revenue

UVic's revenue is primarily from tuition and government grants, but the university also receives revenue from donations, investments, and ancillary operations. Consolidated revenue increased 6.1% to \$808 million.

### Consolidated Revenue

*in thousands of dollars*



## Revenue

<i>In thousands of dollars</i>	2025	2024	Variance \$	Variance %
Government grants & contracts	427,746	395,664	32,082	8.1%
Tuition & student fees	189,616	184,888	4,728	2.6%
Donations, non-government grants & contracts	31,638	26,285	5,353	20.4%
Sales of services & products	81,460	77,275	4,185	5.4%
Investment income	36,935	40,190	(3,255)	-8.1%
Income from business enterprises	750	1,081	(331)	-30.6%
Other revenue	10,850	9,697	1,153	11.9%
Revenue recognized from deferred capital contributions	29,299	26,672	2,627	9.8%
<b>Total Revenue</b>	<b>808,294</b>	<b>761,752</b>	<b>46,542</b>	<b>6.1%</b>

Government grants and contracts revenue is received from the Province of B.C. (71%), the Government of Canada (24%), and other governments (5%). Revenue from the Province increased by \$27.2 million overall, due mainly to funding for targeted program growth and related to salary increases resulting from collective bargaining. Annual grants received from the Province for capital purposes, including routine capital and specific project funding, were \$81.7 million.

Investment income decreased by \$3.3 million as 2023/24 included \$5.8 million of investment income from the settlement of an interest rate swap derivative on debt related to the student housing and dining project. This decrease was offset by increases in investment income related to endowments and the university's working capital. Endowments are outlined in a section below and the university maintains a separate pool of working capital investments, which generated a 5.2% return in 2024/25 (2023/24: 5.4%). These funds support the university's short- to medium-term liquidity and operational needs.

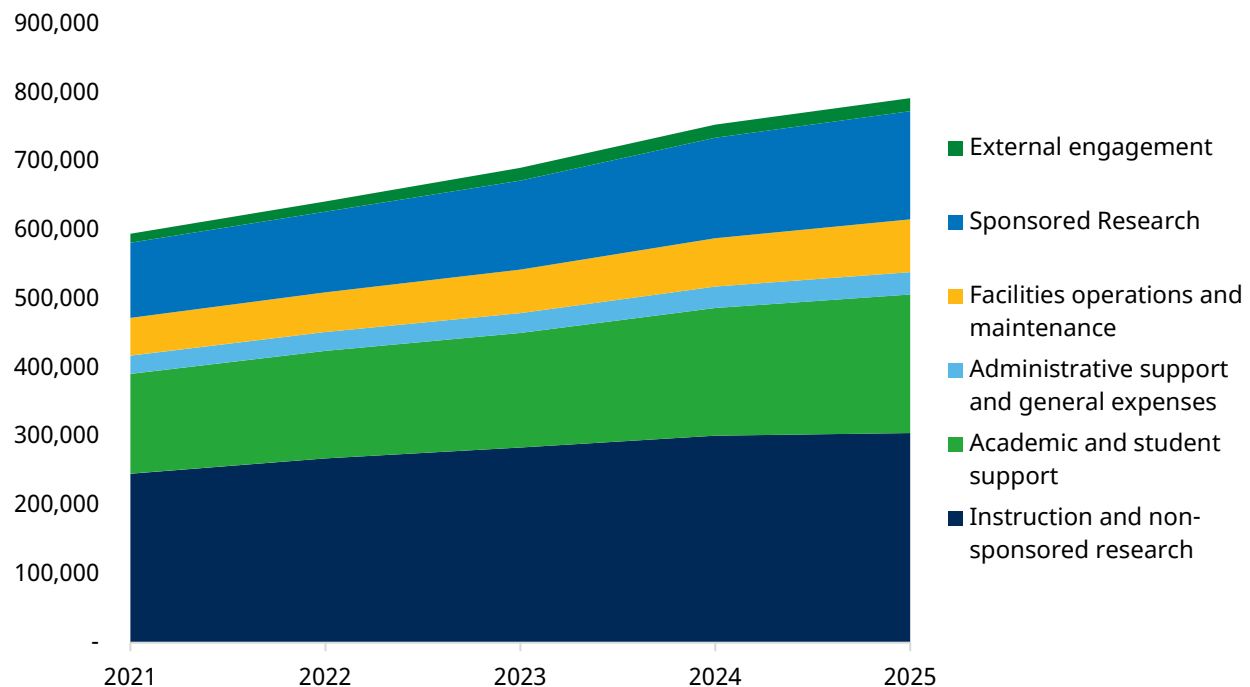
Overall, credit tuition increased to \$164.8 million. This reflects a 2% increase in domestic fees (Provincial Government policy limits annual domestic increases to 2%) and graduate international fees, and a 6.75% increase in undergraduate international fees.

## Expense

Consolidated Expenses increased 5.1% to \$791.9 million reflecting increased salaries and benefits, supplies and services, travel, and scholarships, fellowship, and bursary expenses.

## Consolidated Expenses by Function

*in thousands of dollars*



## Expenses Reported by Object

<i>In thousands of dollars</i>	2025	2024	Variance \$	Variance %
Salaries and benefits	515,926	492,485	23,441	4.8%
Travel	18,861	17,306	1,555	9.0%
Supplies and services	107,777	103,388	4,389	4.2%
Equipment rental and maintenance	11,225	9,880	1,345	13.6%
Utilities	8,252	9,050	(798)	-8.8%
Scholarships, fellowships & bursaries	61,599	56,688	4,911	8.7%
Cost of goods sold	10,751	10,591	160	1.5%
Interest on long term debt	5,572	5,574	(2)	0.0%
Depreciation	52,018	48,661	3,357	6.9%
<b>Total Expenses</b>	<b>791,981</b>	<b>753,623</b>	<b>38,358</b>	<b>5.1%</b>

Salaries and benefits represent 65% of total expenses and increased due to progression through the ranks, negotiated settlements, and hiring during the year. Travel, supplies and services, and cost of goods sold all increased. The highest percentage increase occurred in Equipment rental and maintenance, which rose by 13.6%, or \$1.35 million. Scholarships, fellowships & bursaries saw a significant boost of \$4.9 million reflecting increased support



for students. Utilities was the only category with a notable decrease, dropping due to a warmer winter compared to last year and a continued focus on energy efficiency measures.

### Operating Surplus

The university ended the year with a modest consolidated operating surplus before donations and other adjustments related to the endowment of \$16.3 million or 2.0% of total revenues, up from 1.1% in the prior year. This increase is largely due to a larger gain on the staff pension plan, increased investment in tangible capital assets and positive operating fund result. These were offset by a reduction in ancillary results and a reduced restriction on capital as discussed below.

### Operating Surplus

<i>In thousands of dollars</i>	<b>2025</b>	<b>2024</b>	<b>Variance \$</b>	<b>Variance %</b>
<b>Designated Items</b>				
Staff Pension actuarial gain	7,890	4,786	3,104	64.86%
Ancillary fund surplus	3,671	6,147	(2,476)	-40.28%
Invested in tangible capital assets	9,098	7,302	1,796	24.60%
<b>Non-Designated Items</b>				
Operating fund surplus (deficit)	12,804	8,711	4,093	46.99%
Gain from settlement of derivative	-	5,793	(5,793)	-100.00%
Operating fund restriction for capital	(10,000)	(15,000)	5,000	-33.33%
Other	(7,150)	(9,610)	2,460	-25.60%
<b>Operating surplus</b>	<b>16,313</b>	<b>8,129</b>	<b>8,184</b>	<b>100.68%</b>

Each year the university is required to invest in capital expenditures to meet program requirements and/or address deferred maintenance. While these expenditures are made each year, for accounting purposes the expenditures are not shown as an expense in the year made. Instead, the expenditure is expensed, or amortized, over the future life of the asset. The university received approval to restrict \$10 million of provincial grants for capital expenditures to provide for better matching of revenues and amortization. This restriction only reflects a portion of total capital spending and therefore the year's operating surplus is higher as capital expenditures are not reflected in the operating surplus.

# Endowment

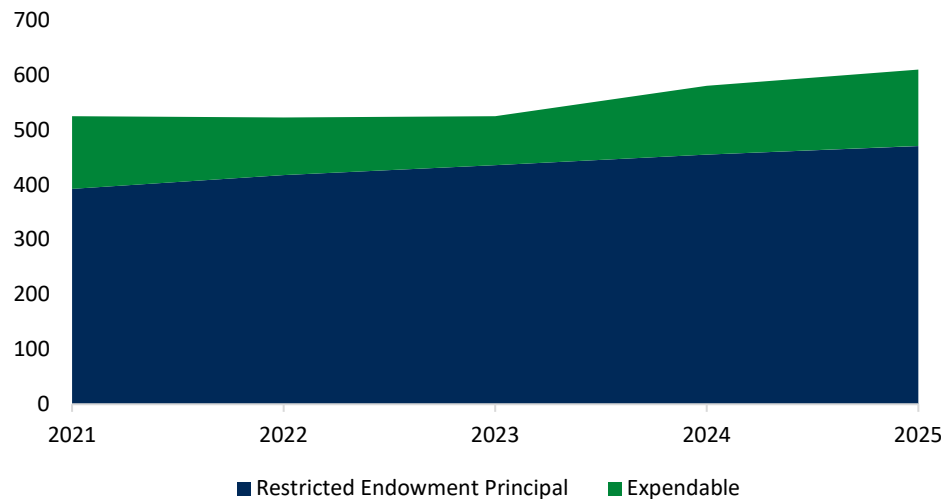
The endowment provides a stable, long-term funding stream to support scholarships, research, and other initiatives as defined by donors. As of March 31, 2025, the investments, held within the University of Victoria Foundation, had a fair market value of \$610.3 million. The endowment portfolio is comprised of 1,622 individual funds that support a wide range of donor-specified academic, research, and student initiatives. In 2024/25, these funds provided \$19.2 million.

The endowment is structured in two components:

- The principal, which includes restricted donations and capitalized investment income, is required to be maintained in perpetuity to preserve long-term support for designated purposes.
- The expendable portion, referred to as the income stabilization account, is recorded as deferred contributions. This account provides a cushion against market volatility and helps ensure consistent funding distributions. As of March 31, 2025, the stabilization account had a balance of \$127.9 million, representing 26.5% of the endowment principal (2023/24: \$114.3 million).

## Endowment

*in millions of dollars*



Endowment investments are managed across eight investment mandates and generated a return of 8.3% for the year, compared to 13.4% in 2023/24. In line with donor intent and Foundation policies, a portion of investment income is capitalized each year to preserve the purchasing power of the endowment against inflation. During the year, restricted

endowment principal grew by \$11.1 million that was capitalized and by \$4.7 million in new donations.

The university's endowment continues to be a vital source of long-term financial support, and the prudent investment and stabilization strategy ensures sustainability and intergenerational equity in meeting donor commitments.

## Related Entities

The university's consolidated financial statements include the following related entities:

Entity	Description	Entity Type	Consolidated Method
<b>UVic Industry Partnerships</b>	Assists with intellectual property management and commercialization of research discoveries	Wholly Owned By UVic	Fully consolidated
<b>UVic Properties Investments Inc.</b>	Manages the university's real estate holdings including the Vancouver Island Technology Park Trust.	Wholly Owned By UVic	Fully consolidated
<b>Ocean Networks Canada Society</b>	Manages the university's VENUS and NEPTUNE ocean observatories	Wholly Owned By UVic	Fully consolidated
<b>Pacific Climate Impacts Consortium</b>	Stimulates collaboration to produce climate information for education, policy and decision-making.	Wholly Owned By UVic	Fully consolidated
<b>Byron Price &amp; Associates Ltd.</b>	Holds land in North Saanich that was donated to the university	Wholly Owned By UVic	Fully consolidated
<b>University of Victoria Foundation</b>	Encourage financial support of the university and administer the university's endowment funds	Wholly Owned By UVic	Fully consolidated
<b>Foundation for the University of Victoria</b>		Wholly Owned By UVic	Fully consolidated
<b>U.S. Foundation for the University of Victoria</b>		Wholly Owned By UVic	Fully consolidated
<b>WCUMSS</b>	Operates a marine research facility at Bamfield on the west coast of Vancouver Island	20% owned by UVic	Proportionate consolidation

Entity	Description	Entity Type	Consolidated Method
<b>Heritage Realty Properties Ltd.</b>	Manages the property rental and downtown hotel and brew-pub operation donated by the late Michael C. Williams	Profit-oriented subsidiaries	Modified Equity
<b>VITP</b>	Provides leased space to technology companies on Vancouver Island	Profit-oriented subsidiaries	Modified Equity
<b>GSB Executive Education Inc.</b>	Provides executive education and other non-credit education	Profit-oriented subsidiaries	Modified Equity



University  
of Victoria

BOG-May27/25-01

## SUBMISSION TO THE UVIC BOARD OF GOVERNORS

**Date:** May 12, 2025

**To:** Executive and Governance Committee

**For:** Decision

**From:** Kristi Simpson, Vice President Finance and Operations

**cc:** President and Vice-Chancellor

**Meeting Date:** May 27, 2025

**Subject:** Updates to LTD Plan Document

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### Recommendation:

*THAT the Executive and Governance Committee recommend to the Board of Governors that the Board of Governors approve the updated Plan Document for the Long Term Disability Plan for Faculty, Librarians and Professional Employees of the University of Victoria.*

### Background:

- The Long Term Disability Trust was established July 1, 2007 to receive and administer employee-funded long term disability contributions for UVic's faculty and administrative and academic professional staff.
- The Long Term Disability Trust recently sought legal advice from Lawson Lundell regarding the obligation of Plan Members to continue payment of LTD premiums within six months of their Normal Retirement Date.
- While the LTD Plan Document does not have a provision dealing specifically with employees' contribution obligations, it does refer to these obligations. In particular, the Coverage Termination Provisions provide that an employee's coverage will terminate if the employee fails to pay the "required Employee premium contributions." Additionally, the "Extension of Coverage" provisions in Section 2 provide that if an employee is on leave, their coverage under the Plan will only continue if they employee continues to make contributions during the leave.
- Accordingly, since coverage will terminate if contributions are not paid, employees must continue to make contributions until the occurrence of a coverage termination event (e.g. attainment of Normal Retirement Date).

- The result is that there can be a period in the six months prior to an employee's Normal Retirement Date where due to the Elimination Period, the employee is required to make contributions to the Plan but will not be able to receive LTD benefits if they become Disabled in that period.
- Lawson Lundell observed that coverage under LTD plans normally stops at the normal retirement date minus the elimination period. The UVic Plan's continuation of coverage and contributions for a period during which no benefit could be received (i.e., the 6-month period before Normal Retirement Date) is not common.
- To that end, Lawson Lundell advised, if the Trust wished to avoid having employees make contribution during a period that they cannot receive benefits, that the Plan Document be amended to clearly provide that coverage, and therefore contributions, terminate on the date the employee reaches their Normal Retirement Date less the Elimination Period. Such an update to the Plan Document would have the added benefit of aligning with the Coverage Commencement Provisions, which do not allow an employee to join the Plan if they are over the Normal Retirement age less the Elimination Period.
- The LTD Trustees accepted this recommendation and asked the University to make the necessary changes to the Plan Document, which are enclosed in this package. The key changes are in the "Termination of Coverage" provision.

**Previous Consultation:**

LTD Trust

Lawson Lundell

**Planned Further Action:**

- The Trust has approved and implemented an interim regulation to manage these changes effective January 1, 2025, pending the final review and approval of the Plan Document by the University.
- The Trust will communicate to LTD Plan members through the publication of the Annual Report and to the Joint Benefit Advisory Committee.

**Attachment(s):**

Plan Document with proposed blackline changes

Plan Document (clean version)



University of Victoria

**LONG TERM DISABILITY PLAN  
FOR FACULTY, LIBRARIANS AND PROFESSIONAL EMPLOYEES OF  
THE UNIVERSITY OF VICTORIA**

**PLAN DOCUMENT**

<b>Effective Date</b>	July 1, 2024
<b>Plan Sponsor</b>	The Board of Trustees of The Long Term Disability Plan for Faculty, Librarians and Professional Employees of the University of Victoria
<b>Plan Benefit</b>	Long Term Disability
<b>Contract Number</b>	ASO 41071

**UNOFFICIAL CONSOLIDATION**

**Prepared April 22, 2025**

**Includes the following amendment:**

- **Proposed Amendment No. 2025-01 made on [date]**

**While care has been taken in the preparation of this consolidation, if there is a discrepancy between this consolidated plan text and the plan text and amendment documents adopted by the Board of Trustees and the University of Victoria, the latter documents shall prevail.**





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## Benefit Details

<b>Eligibility</b>	Faculty, Librarians, and Professional Employees as outlined in Appendix 1
<b>Participation</b>	As outlined in Appendix 1
<b>Waiting Period</b>	No waiting period – effective 1 <sup>st</sup> of month coinciding with or following appointment
<b>Frequency of Benefit Payments</b>	Semi-monthly payments on the 15 <sup>th</sup> and last day of the month
<b>Prorate</b>	1/30 of the monthly Benefit Amount
<b>Monthly Benefit Amount</b>	80% of the monthly Net Earnings at the date of the first benefit payment
<b>Cost of Living Adjustment (COLA)</b>	<p>A cost of living adjustment will be provided each year beginning on January 1 after the first full calendar year of Disability. The COLA is determined by multiplying the Employee's Monthly Benefit Amount reduced by any disability benefits payable under a public pension plan (CPP, QPP) and Pension Contribution by an adjustment. The adjustment used in this calculation is equal to the lesser of:</p> <ol style="list-style-type: none"> <li>1) the following, minus one (1): the average of the Consumer Price Indices (CPI) for the 12 months ending on June 30 of the year preceding the year for which the calculation is being made divided by the average of the CPI for the 12 months ending on June 30 of the year in which the Employee became Disabled: or</li> <li>2) the most recent annual general adjustment granted to faculty or to administrative and academic professional staff as applicable.</li> </ol> <p>In years when 1) is greater than 2) above, the difference will accumulate and will be applied to the total adjustment in years when 2) is greater than 1). The accumulated adjustment, or a portion thereof, will be added to 1), provided 1) is less than 2). However, in no event will the total adjustment be greater than 2).</p>
<b>Pension Contribution</b>	In addition to the monthly Benefit Amount, 15.42% of monthly Basic Earnings up to 1/12 of the current yearly maximum pensionable earnings under CPP plus 19.05% of monthly Basic Earnings in excess of 1/12 of the current yearly maximum pensionable earnings under CPP
<b>Elimination Period</b>	Six months. The Employee must complete the Elimination Period prior to Normal Retirement
<b>Maximum Benefit Period</b>	Date of early retirement or Normal Retirement
<b>Termination Age</b>	Coverage will cease on the date of early retirement or the date an Employee reaches Normal Retirement

<b>Tax Status</b>	Benefit payments from the Plan are not taxable as income as Employees pay 100% of the premium cost.
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## Section 1

In this section appear definitions, conditions, and provisions relating to the benefits under this Plan.

### Definitions

Reference to the singular also includes the plural when the context so requires.

#### **Accident or Accidentally**

means an unexpected or unforeseen happening or event involving an external force, causing loss or Injury, independently of all other causes.

#### **Actively at work, Actively employed or Active employment**

means attendance at the Employee's usual place of employment with the University of Victoria ("The University"), performing normal duties for a normal working day or shift, or on paid vacation or statutory holiday or on a regular non-working day and capable of being at work. If an Employee is not required to report for work, he or she shall be considered Actively employed provided he or she is not confined to a Hospital nor Disabled to the degree that he or she cannot perform all of the usual and customary duties of his or her occupation. It does not mean:

- employment where the Employee does not meet the eligibility or Waiting Period requirements specified in Appendix I or the *Benefit Details*
- employment not at the usual place of employment or business unless at a location to which the business requires the Employee to travel.

#### **ASO Contract**

means a contract between BC Life and Casualty Company (BC Life) and the Plan Sponsor ("The Board of Trustees") under which BC Life, acting as agent of the Plan Sponsor, agrees to provide certain administrative services with respect to the Plan Sponsor's long term disability plan without assuming the Plan Sponsor liabilities. The ASO Contract number relating to the Plan is 41071.

#### **Basic Earnings**

means the amount the Employee normally earns on a regular, formal basis from employment with the University at the date of the first LTD benefit payment. Additional income earned from bonuses, commission and overtime is excluded.

Annual basic earnings for an Employee who is subject to lay-off, or whose hours and earnings fluctuate, is based on the Employee's regular Basic Earnings in the 12 month period prior to the date of the LTD claim, excluding overtime and bonuses. If the Employee has worked less than 12 months for the Employer, an average will be calculated for the period employed.

The Employee's T4/T4A slips may be required as Proof. If any discrepancy arises, ~~contribution~~premium levels will be adjusted and backdated accordingly. It does not include income from dividends, profit sharing, and deferred compensation.

#### **Benefit Amount**

means the scheduled amount of benefit for which the Employee is eligible as of the date of the first benefit payment, as indicated in the *Benefit Details*.

**Benefit Period**

means the period of time, after the Elimination Period, during which a Benefit Amount is payable, as indicated in the *Benefit Details*.

**Business Information**

means information about the University's business, employment practices and benefits activity, and includes information about individuals which is anonymous and aggregated in statistical form, but excludes Personal Information.

**COLA**

means Cost of Living Adjustment.

**CPI**

means the all item Consumer Price Index Canada.

**CPP**

means Canada Pension Plan.

**Disabled or Disability**

means an Employee who is wholly and continuously disabled due to Sickness or Injury and as a result is unable to perform the duties of his or her normal occupation or the duties of any occupation for which he or she is fitted by education, training or experience. Availability of work is not considered when assessing Disability. The Employee must be receiving from a Physician, care that is appropriate for the condition causing the Disability.

**Elimination Period***Classes 12 and 19*

means the period of continuous and total Disability which must be completed before any Benefit Amount becomes payable, as indicated in the *Benefit Details*, unless as otherwise specified in the benefit description. If the employee attempts a return to work for a cumulative total of 90 days or less during this period, the days the employee has returned to work will also be accumulated to satisfy the elimination period if the disability continues to result from the same injury or sickness. Each full or partial return to work day will be counted as 1 day in the cumulative total.

*Classes 11, 13, 20, 21, 25, 93, 94, 97 Effective July 1, 2010*

means the period of total disability which must be completed before any Benefit Amount becomes payable, as indicated in the *Benefit Details*. If the employee attempts a return to work for a cumulative total of six weeks (30 working days) or less during this period, the days the employee has returned to work will also be accumulated to satisfy the elimination period if the disability continues to result from the same injury or sickness. Each full or partial return to work day will be counted as 1 day in the cumulative total.

**Employee**

means an Employee employed by the University who continues to meet the eligibility requirements as described in Appendix I and the *Benefit Details*. This includes individuals who are:

- directly employed by and compensated for services by the University

- Employees of any corporation or other business organization associated or affiliated with the University as a subsidiary or otherwise, who are appointed and paid through the University payroll.

It does not include Employees who choose to work past the Normal Retirement Date, those already retired, or individuals employed on a casual basis.

**Employer**

means the University of Victoria.

**Gross Monthly Benefit Amount**

means the Employee's monthly Benefit Amount before any reduction for other income benefits and earnings.

**Hospital**

means an institution operated pursuant to law for the care and treatment of sick and injured persons, with organized facilities for diagnosis and major surgery, and 24-hour nursing services.

**Indexed Pre-disability Earnings**

means the Employee's Basic Earnings, adjusted on the first anniversary of the LTD benefit payments and each following anniversary by the lesser of 10% of the current annual percentage increase in the CPI. If the CPI is no longer available in its present form, a similar measurement will be used.

**Injury**

means accidental bodily injury resulting solely and directly from external, violent, and accidental means and independent of all other causes.

**Increased Amount of Insurance**

means an Employee's additional amount of LTD Insurance which may have increased due to a change in the maximum Benefit Amount.

**LTD**

means Long Term Disability.

**Net Earnings**

means basic gross earnings less federal and provincial income taxes, Employee contributions to an Employer pension plan, Employment Insurance and Canada Pension Plan as deducted from pay at source.

**Normal Retirement Date**

means June 30 coinciding with or following the Employee's 65th birthday.

**Personal Information**

means any information about an identifiable individual.

**Physician**

means an individual who is duly qualified and licensed to practice medicine or surgery, or both, in the area where the services are provided and is acting within the scope of that license, but excludes a Physician residing with or related to the Employee.

**Plan**

means the program of long term disability benefits set out in this document.

**Plan Administrator**

means BC Life and Casualty Company.

**Plan Sponsor**

means The Board of Trustees of the Long Term Disability Plan for Faculty, Librarians and Professional Employees of the University of Victoria.

**Proof**

means written evidence that verifies the circumstances of an event or establishes a fact and which:

- the Plan Administrator approves as written evidence that verifies the circumstances of an event or establishes a fact;
- must be received at the office designated by the Plan Administrator
- must be on the forms designated by the Plan Administrator

**QPP**

means Quebec Pension Plan.

**Rehabilitation Program**

means one or more activities, recommended by the Plan Administrator and agreed to by the Employee's Physician which can be expected to facilitate a Disabled Employee's return to gainful employment.

**Rehabilitation Income**

means income which the Employee receives for work performed under a Rehabilitation Program, including self employed income.

**Sickness**

means illness or disease.

**University**

means the University of Victoria.

**Waiting Period**

means a period of continuous employment in an eligible class with the University, after which the Employee becomes eligible for coverage, as indicated in the *Benefit Details*.



## Section 2

### General Conditions of Coverage

#### Eligibility for Coverage

An Employee will be eligible for the coverage specified in the *Benefit Details* provided the Employee:

- is Actively employed;
- is under the Normal Retirement age less the Elimination Period; and
- has provided the University with a written application.

#### Commencement of Coverage

An Employee's coverage commences on the first day of the month coincident with or next following the appointment, as outlined in the *Benefit Details*, provided the Employee is Actively at work on that date.

#### Change of Coverage

A change in an Employee's coverage will commence on the first day the Employee is Actively employed coincident with or immediately following the date the Employee is eligible for such change. However, if an Employee is on a paid medical leave of absence at the time he or she becomes eligible for a change in coverage due to a salary increase, the Actively at work requirement shall be waived and the amount of income applied for the calculation of coverage amounts shall reflect the increases implemented while not Actively at work.

For the purpose of applying the provisions of this section only, an Employee is considered to be Actively Working while on vacation, provided the Employee is not confined to a Hospital or Disabled due to Sickness or Injury.

#### Proof of Age

The Plan Administrator may require a person to submit Proof of his or her age;

If an Employee's age has been misstated and misstatement affects:

- the date on which the Employee's coverage commences or ceases; or
- any rights or benefits provided under this Plan,

the correct age governs, and the Employee's coverage will be adjusted accordingly.

#### Workers' Compensation

This Plan is not in lieu of, and does not affect, any requirement for coverage by Workers' Compensation insurance.

#### Termination of Coverage

~~And~~ If an Employee is not in receipt of an LTD benefit under this Plan, the Employee's coverage will cease, except as specified under *Extension of Coverage*, on the date on which the earliest of the following events occurs:

- the benefit terminates under this Plan, or coverage for the group, division or class to which the Employee belongs terminates.

- the Employee attains the termination age stated in the Benefit Details.
- the Employee commences active duty in the armed forces of any country, state, or international organization
- the Employee fails to pay the required Employee premium ~~contributions~~[payments](#)
- the Employee no longer satisfies the definition of Employee
- the Employee is not Actively employed
- the Employee ceases to be in an eligible class
- ASO Contract 41071 terminates
- the Employee retires ~~or~~
- the Employee reaches Normal Retirement Date less the Elimination Period
- the Employee dies
- the University terminates the Employee's coverage

If, on the date an Employee's LTD benefit ceases under the *Termination of Benefits* provision, any of the above listed events have occurred, the Employee's coverage will cease, except as specified under *Extension of Coverage*.

### **Extension of Coverage**

Coverage for an Employee is extended as follows:

- an Employee on approved sick leave may be covered until he or she recovers, provided the University agrees to such an extension
- an Employee whose regular employment includes annual periods of layoff with a predetermined recall date, coverage will continue during the layoff period with no premium payments required, provided the University agrees to such an extension. Any Disability benefits payable will be based on the Employee's Basic Earnings
- an Employee who is on vacation, may have his or her coverage extended, provided the University agrees to such an extension
- an Employee who is on an approved leave of absence (other than for parental or maternity), or on a Recall List, may have his or her coverage extended provided the University agrees to such an extension
- an Employee who is on parental or maternity leave of absence may be covered for the duration of the leave provided the University agrees to such an extension.
- where an Employee becomes Disabled while on leave of absence, seasonal lay-off or maternity or parental leave, benefits will not be payable until the later of the end of the Elimination Period or the scheduled return to work date
- an Employee's coverage under this Plan will only continue if the Employer acting in accordance with the rules precluding individual selection, continues the Employee's coverage and the Employee continues to make ~~contributions~~[premium payments](#) to the Plan during the leave.

- if the benefit extension permitted under this section is less than the minimum required by governing legislation, the terms of the Plan will be extended to agree with the minimum required of such law

In no event will benefits extend beyond the termination of ASO Contract 41071.

### **Payment of Premiums**

Each Employee who is covered under the Plan in accordance with this Section 2 must pay the required Employee premiums at the rate set by the Plan Sponsor, provided that:

- pursuant to the *Extension of Coverage* provision, no premium payments are required during certain annual periods of layoff; and
- pursuant to the *Waiver of LTD Premium* provision, no premium payments are required to be made by an Employee in receipt of an LTD benefit under this Plan.

Employees shall pay such premiums by means of payroll deduction. The University shall remit the premiums to the LTD Trust Fund at least monthly.

## **Section 3**

### **Benefit Provisions**

#### **Claim Procedure**

- The Plan Administrator must receive written notice of claim within 6 months of the date Disability began.
- The Plan Administrator must receive Proof of claim within 12 months of the date Disability began.
- The claimant must provide information required to prove their claim and must also authorize the Plan Administrator to obtain information from other sources for this purpose. Whenever the Plan Administrator requests information or authorization, it must be submitted to the Plan Administrator within 6 months. If it is not submitted within this time, the Trust will not be liable for any further Benefits.
- Proof of claim is at the Employee's expense.
- While an Employee is receiving benefits, the Plan Administrator may require further Proof of ongoing Disability, and the Plan Administrator shall have the right to require a claimant to undergo a physical or mental evaluation when and as often as may be reasonably necessary.
- No legal action for the recovery of any claim may be brought against the Plan Sponsor within 60 days or after 3 years from the expiration of the time in which the Proof is required.
- If the terms of the Plan for filing Proof of claim or bringing any legal action are less than that permitted by applicable law, the Plan provisions will be extended to agree with the law.

#### **Claim Payments**

- When the Plan Administrator accepts Proof of an Employee's claim, the Employee's benefit will be determined in accordance with the provision of the Plan.
- Claim payments are made payable to the Employee and will ordinarily be sent directly to the Employee or deposited directly to the Employee's bank account, at the Employee's option.
- If the Employee dies before all benefits have been paid, the remaining benefits to which the Employee was entitled prior to his or her death will be paid to the Employee's estate.
- No claims will be paid by BC Life after ASO Contract 41071 is terminated.

#### **Overpayment**

If an Employee's benefits are overpaid the Employee is responsible for repayment within 6 months, or within a longer period if agreed to by the Plan Sponsor. If the Employee fails to fulfill this responsibility, further Benefits will be withheld until the overpayment is recovered. This does not limit the Plan Sponsor's right to use other legal means to recover the overpayment.

#### **Source of Benefit Payments**

Benefits payable to Employees whose claims have been assessed as qualified are paid by the Plan Administrator, and that company is reimbursed for these payments out of a separate LTD University ledger account. Into this account are transferred Employee ~~contributions~~[premium](#).

payments deducted by the University from payroll, and these ~~contributions~~premiums provide the entire funding for the reimbursement. ~~Contribution~~Premium monies in this account are meanwhile invested in University pooled funds. However, in order to ensure that *Income Tax Act (Canada)* requirements are met for the non-taxable status of LTD payments in the Employee claimant's hands, this LTD Trust is being created by the University which will be the sole recipient of all deducted ~~contributions~~premiums. No other monies except Employee ~~contributions~~premiums will be held in the Trust Fund, the University will not be entitled to any monies in the Fund, and the Fund will be separately invested.

Those Employees who are receiving claim payments prior to July 1, 2007, will continue to receive those payments from the Plan Administrator, and that company will continue to be reimbursed out of the monies in the University ledger account. When those account monies are exhausted, the Plan Administrator will then be reimbursed out of the LTD Trust Fund, and Employees will then appear in the LTD Trust records as persons on behalf of whom reimbursements have been made to the Plan Administrator.

Employees whose claims are made and assessed as qualified as of July 1, 2007 forward, will be paid by the Plan Administrator, and that company will be reimbursed for those claims out of the LTD Trust Fund. The names of those claimants will therefore appear at once in the LTD Trust records as persons on behalf of whom reimbursements have been made to the Plan Administrator.

In the above manner, it is intended that there will be a seamless transition for all Employees and the Plan Administrator from the present University ledger account to the LTD Trust Fund.

### **Third Party Liability**

No benefits are payable under this Plan if an Employee has the right to recover money from a third party or their insurer as compensation for Injury or Sickness. However, if liability has not yet been determined, then an Employee may apply to use an advance payment of any benefits, which the Employee may ultimately be entitled to receive under this Plan.

The Plan Administrator shall make no advance payment of benefits unless the Employee is otherwise eligible to receive benefits and the Employee agrees in writing:

- to take all necessary action to recover from the third party the total of the benefits advanced by the Plan Administrator.
- to direct the third party, their insurer, or the Employee's lawyer to pay to the Plan Administrator from any judgment or settlement obtained from or on behalf of the third party an amount equal to the total amount of money advanced by the Plan Administrator.
- that any judgment or settlement obtained from or on behalf of the third party that does not specify an amount for wage loss shall be deemed to include wage loss in an amount equal to the benefits advanced by the Plan Administrator.
- to pay all legal fees incurred in pursuing any claim against the third party.
- to enter into a Reimbursement Agreement with the Plan Administrator establishing the terms and conditions for repayment of benefits advanced.
- to repay to the Plan Administrator the full amount of benefits advanced to the Employee in the event the claim against the third party is abandoned or settled without the Plan Administrator's written consent.
- to irrevocably authorize the third party, or their insurer, to release to the Plan Administrator all information in their possession relating to the Employee's claim including full particulars of any settlement or judgment.

- to authorize the third party's insurer to pay directly to the Plan Administrator from any settlement of judgment an amount equal to the benefits advanced by the Plan Administrator.

If the Employee fails to comply with the provision outlined above, then the Plan Administrator may terminate the advance payment of benefits.

An Employee may make no further claims for benefits arising out of any Injury or Sickness for which monies are paid by or on behalf of a third party after the Employee has entered into a settlement with or obtained judgment against the third party.

### **Appeals**

An Employee has the right to appeal a denial of all or part of the benefits described in the Plan as long as the Employee does so within two years after the denial.

### **Exclusions**

No benefit is payable when any of the following situations occur:

- the Employee is not under continuing medical supervision and treatment considered satisfactory by the Plan Administrator.
- any period after the Employee fails to participate or cooperate in a Rehabilitation Program that has been recommended or approved by Plan Administrator.
- Disability is due to intentional self-inflicted Injury or Sickness while sane or insane.
- Disability is due to bodily Injury resulting directly or indirectly from war, whether declared or undeclared, or any act of war or participation in a riot, insurrection or civil commotion.
- Disability is due to voluntary participation in a riot or civil commotion except while an Employee is in the course of performing the duties of his or her occupation.
- the Employee is on maternity or parental leave of absence or could be placed on such leave by the University according to any maternity or parental leave provisions in the relevant government legislation. An Employee who becomes Disabled due to any cause prior to such leave of absence is eligible for benefits. However, once such Disability extends into the leave of absence, benefits are suspended for the duration of the maternity or parental leave. Any portion of the maternity or parental leave of absence subsequent to the onset of Disability will be applied towards completing the Elimination Period. An Employee who is unable because of Disability to return to work as scheduled after a maternity or parental leave of absence, whether such Disability arose prior to or during the leave of absence, will become eligible for commencement or continuation of benefit payments on his or her scheduled return to work date, provided the Employee is otherwise eligible for benefits. If an Employee fails to qualify for maternity or parental leave of absence because of failure to meet the length of service requirements in the relevant government legislation, benefits will not be payable for Disability due to any cause during any leave of absence agreed upon by the University and Employee or after the date the Employee's coverage ceases.
- Disability is related to any condition, which commenced prior to the date the Employee became covered under this Plan and for which the Employee received treatment within the

3 months immediately preceding the date coverage began. This limitation will not apply after such Employee has been Actively at work and covered under this Plan for 12 consecutive months.

- An Employee who must hold a government permit or license to perform his or her duties will not be considered Disabled solely because such permit or license has been withdrawn or not renewed.

### **Payment of Benefit**

Total Disability must begin while the Employee is covered under the Plan. The Elimination Period will commence with and be calculated from the date Disability starts. Payment for a period of less than one month will be prorated. The monthly Benefit Amount, the prorated and the Elimination Period are shown in the *Benefit Details*.

Following the expiration of the Elimination Period benefits will be paid to the Employee semi-monthly on the 15<sup>th</sup> and last day of the month for any period for which the Plan Administrator is required to make payment.

### **Pension Contribution**

In order to continue a Disabled Employee's participation in the University's pension plan, the Plan Administrator will send the monthly pension contribution to the University. This contribution is payable only while the Employee is entitled to receive the monthly benefit, as specified under the *Benefit Details*. The amount of monthly pension contribution is specified under the *Benefit Details*. This contribution will be modified by the COLA described under *Benefit Details*.

### **Application for CPP Disability Benefits**

Based on the medical evidence provided, the Plan Administrator will determine if and when it is appropriate for an Employee to apply for Canada Pension Plan Disability Benefits. The Employee will be required to make application for such benefits as requested. This will ensure that the Plan does not inadvertently pay for benefits that would otherwise be available from a government source. Offset calculations will be in accordance with the integration provisions of each Plan as outlined below.

### **Calculation and Integration of Benefit Amount**

- To calculate the Monthly Benefit Amount payable multiply the Employee's monthly Basic Earnings by the benefit percentage shown in the *Benefit Details*.
- Deduct the following direct offsets from the amount determined above:
  - any Disability or retirement benefit under the Canada or Quebec Pension Plan (or any similar Plan or act), excluding those public pension plan disability benefits payable to the Employee on behalf of his or her Dependent children. An amount equal to 73% of such benefits will be applied to reduce the monthly Benefit Amount payable under this Plan
  - benefits under the Worker's Compensation Act or similar legislation
  - any loss of time, salary continuance, Disability, or retirement benefit the University provides or arranges
  - earnings or payments from any employer
  - any other group Disability insurance Plan (including a Plan under which the Employee is insured because he or she belongs to an association)

- any income replacement indemnity payable under any automobile insurance Plan or policy (including any government legislated no-fault auto insurance)
- Disability benefits payable under any other government Plan excluding Employment Insurance benefits.
- The monthly Benefit Amount will be reduced by the following benefits or payments resulting from the Employee's Disability if, on or after the date the Employee becomes Disabled, the Employee begins to receive such benefits or payments, or would be entitled to receive them had the Employee made satisfactory application:
  - the amount equal to 73% of any Disability or retirement benefits payable under the Canada/Quebec Pension Plan (or any other public pension plan) will be applied to reduce the monthly Benefit Amount
  - the amount by which any benefits payable under a public pension plan to the Employee on behalf of his/her Dependent children exceed the applicable percentage of Basic Earnings (adjusted in accordance with the subsequent changes in the Consumer Price Index) as shown in the table below:

<b>Number of Dependent Children</b>	<b>Employees Earning Less Than \$10,000 Annually</b>	<b>Employees Earning \$10,000 and Over Annually</b>
1	10%	5%
2	13%	8%
3	16%	11%
4	19%	14%
5 and more	20%	15%

- When determining the amount of such income the following will apply:
  - any of these benefits which are not payable on a monthly basis, will be converted to a monthly basis
  - any government awards which have not been determined by the time this benefit is payable will be estimated
  - the monthly benefit for a Disabled Employee who attains age 65 while receiving Plan Benefits, will be calculated using the same offset for Disability benefits payable under the Canada Pension Plan or Quebec Pension Plan which applied prior to his or her 65<sup>th</sup> birthday. No adjustment will be made for the remaining Benefit Period to account for the change to retirement benefits provided by the government
  - any change due to a cost of living increase will not be taken into account.

### **Pregnancy**

A Disability which is due in whole or in part to pregnancy will have benefits payable on the same basis as any other Sickness, provided that no benefits will be payable:

- during any period of formal maternity leave and/or parental leave taken by the Employee pursuant to provincial or federal law or pursuant to mutual agreement between the Employee and the Plan Sponsor.



- During any period for which the Employee is paid or is eligible to be paid Employment Insurance maternity and/or parental leave benefits.

### **Preexisting Conditions**

Preexisting condition means a Sickness or Injury for which the Employee received medical treatment, consultation, care or services (including diagnostic measures), or consumed prescribed drugs within 3 months:

- Prior to his or her effective date under this benefit, or
- Prior to the effective date of any Increased Amount of Insurance.

This Plan does not provide an LTD benefit or an Increased Amount of Insurance for any Disability caused by, contributed to by, or resulting from a Preexisting condition, with the following exceptions:

- this exclusion will not apply to a Disability which commences more than 12 months after:
  - the Employee's effective date under this benefit, or
  - the effective date of the Increased Amount of Insurance

### **Recurrent Disability**

Benefit payments will be subject to the terms of this Plan for the prior Disability.

*Classes 11, 12, 19, 21, 25, 93, 94, 97*

If an Employee returns to any occupation for normal duties for 6 months or more, a Recurrent Disability will be treated as a new period of Disability. The Employee must complete another Elimination Period. To prevent over insurance because of duplication of benefits, a Benefit Amount payable under this *Recurrent Disability* provision will cease if benefits are payable to the Employee under any other group long term disability policy.

*Classes 13 and 20 Effective July 1, 2019*

If an Employee returns to any occupation for normal duties for 12 months or more, a Recurrent Disability will be treated as a new period of Disability. The Employee must complete another Elimination Period. To prevent over insurance because of duplication of benefits, a Benefit Amount payable under this *Recurrent Disability* provision will cease if benefits are payable to the Employee under any other group long term disability policy.

If the Disability is considered to be recurrent, the monthly benefit is subject to all of the provisions of this benefit with the following exceptions:

- the Employee is entitled to benefit payments on the date the Disability recurred
- the monthly benefit will be based upon the same earnings level as at the original date of Disability.
- An Employee's Disability can be considered to be a recurrence of his or her previous Disability provided the subsequent Disability is due to an Injury or Sickness directly related to the causes of the immediately preceding Disability.
- If the Employee was involved in a Rehabilitation Program or rehabilitative employment, as specified under *Rehabilitation Program*, and:

- subsequently becomes Disabled due to an Injury or Sickness directly related to the causes of the immediately preceding Disability, or
- was unable to continue in such program or employment because of the Disability for which he or she received Benefits under the Plan, then, for the purposes of this provision, the Employee's Disability will be considered recurrent.

### **Rehabilitation/Return to Work Program**

The Rehabilitation/Return to Work program is designed to help Disabled Employees return to gainful employment, and wherever possible to resume his or her normal duties. The program requires the Plan Administrator's pre-approval and the agreement of the attending Physician. It may include (but is not limited to) any of the following:

- a return to work on a part-time or full-time basis
- therapy and counselling
- vocational evaluation
- job preparation

In considering whether a Rehabilitation Program is appropriate, the Plan Administrator will assess such factors as the expected duration of Disability, and the level of activity required to facilitate the earliest possible return to employment. Income received under the Rehabilitation Program will be integrated, as described under *Calculation and Integration of Benefit Amount*, when calculating the Employee's monthly benefit payment.

A Disabled Employee who is involved in a Rehabilitation Program or employment where such program or employment is considered appropriate for rehabilitation purposes by the Plan Administrator, will not have his or her monthly Benefits terminated but continued as follows:

- total income from all sources cannot exceed 90% of the Employee's Net Earnings, as outlined in the *Benefit Details* at the date Disability commenced, and will be adjusted for subsequent changes in the Cost of Living
- Benefits will be paid for a maximum of 24 months.

If the Employee cannot continue in such Rehabilitation Program or employment due to his or her Disability, the Employee will again be subject to the regular provisions of this benefit.

### **Waiver of LTD Premium**

The Trust will waive the ~~contribution~~[premium](#) for the LTD coverage of an Employee to whom LTD benefits became payable under this Plan, commencing with the premium for the first full calendar month for which benefits became payable. This waiver of premium will continue until the date the Employee's monthly benefit payments cease. Coverage under this benefit will be reinstated when the Employee is again Actively at work and premium payments are resumed.

### **Termination of Benefit**

Monthly Benefit payments will cease on the earliest date one or more of the following occurs:

- the Employee ceases to be Disabled.
- the Employee is no longer receiving, from the attending Physician, regular medical care and treatment that the Plan Administrator considers satisfactory.

- the Employee fails to submit Proof, satisfactory to the Plan Administrator, of the continuance of Disability.
- the Employee refuses a medical examination by a Physician chosen by the Plan Administrator.
- the Employee is no longer following the treatment recommended for the Disability.
- the Employee refuses to participate in the Rehabilitation Program.
- the Employee's current earnings exceed the percentage allowed under this Plan.
- the Employee attains the Termination Age specified in the *Benefit Details*.
- the end of the maximum Benefit Period specified in the *Benefit Details*.
- the Employee dies.

## **APPENDIX 1 – Eligible Employee Groups and Participation**

<b>Long Term Disability Plan</b>
Executive - regular and term (class 11) – required participation
Faculty - regular (class 12) – required participation
Administrative and Academic Professional - regular and regular sessional (class 13) required participation
Professional librarians - continuing (class 19) – required participation
Management Excluded - continuing (class 20) – required participation
Physicians - continuing (class 21) – required participation
External Management (class 25) – voluntary participation
TRIUMF Engineers & Technicians (class 93) – required participation
TRIUMF Research Scientists (class 94) – required participation
Agency Management - (class 97) – voluntary participation

Document comparison by Workshare Compare on Tuesday, April 22, 2025  
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Description	#27493198v1<Lawson> - UVic LTD Trust Plan 2024_PLAN DOCUMENT
Document 2 ID	iManage://DMS/Lawson/27493198/2
Description	#27493198v2<Lawson> - UVic LTD Trust - Plan Document (incl Amendment 2025-01) (DRAFT)
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Statistics:	
	Count
Insertions	33
Deletions	16
Moved from	0
Moved to	0
Style changes	0
Format changes	0
Total changes	49



University of Victoria

**LONG TERM DISABILITY PLAN  
FOR FACULTY, LIBRARIANS AND PROFESSIONAL EMPLOYEES OF  
THE UNIVERSITY OF VICTORIA**

**PLAN DOCUMENT**

<b>Effective Date</b>	January 1, 2025
<b>Plan Sponsor</b>	The Board of Trustees of The Long Term Disability Plan for Faculty, Librarians and Professional Employees of the University of Victoria
<b>Plan Benefit</b>	Long Term Disability
<b>Contract Number</b>	ASO 41071

**UNOFFICIAL CONSOLIDATION**

**Prepared April 22, 2025**

**Includes the following amendment:**

- **Proposed Amendment No. 2025-01 made on May 28, 2025**

*While care has been taken in the preparation of this consolidation, if there is a discrepancy between this consolidated plan text and the plan text and amendment documents adopted by the Board of Trustees and the University of Victoria, the latter documents shall prevail.*

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## Benefit Details

<b>Eligibility</b>	Faculty, Librarians, and Professional Employees as outlined in Appendix 1
<b>Participation</b>	As outlined in Appendix 1
<b>Waiting Period</b>	No waiting period – effective 1 <sup>st</sup> of month coinciding with or following appointment
<b>Frequency of Benefit Payments</b>	Semi-monthly payments on the 15 <sup>th</sup> and last day of the month
<b>Prorate</b>	1/30 of the monthly Benefit Amount
<b>Monthly Benefit Amount</b>	80% of the monthly Net Earnings at the date of the first benefit payment
<b>Cost of Living Adjustment (COLA)</b>	<p>A cost of living adjustment will be provided each year beginning on January 1 after the first full calendar year of Disability. The COLA is determined by multiplying the Employee's Monthly Benefit Amount reduced by any disability benefits payable under a public pension plan (CPP, QPP) and Pension Contribution by an adjustment. The adjustment used in this calculation is equal to the lesser of:</p> <p>1) the following, minus one (1): the average of the Consumer Price Indices (CPI) for the 12 months ending on June 30 of the year preceding the year for which the calculation is being made divided by the average of the CPI for the 12 months ending on June 30 of the year in which the Employee became Disabled: or</p> <p>2) the most recent annual general adjustment granted to faculty or to administrative and academic professional staff as applicable.</p> <p>In years when 1) is greater than 2) above, the difference will accumulate and will be applied to the total adjustment in years when 2) is greater than 1). The accumulated adjustment, or a portion thereof, will be added to 1), provided 1) is less than 2). However, in no event will the total adjustment be greater than 2).</p>
<b>Pension Contribution</b>	In addition to the monthly Benefit Amount, 15.42% of monthly Basic Earnings up to 1/12 of the current yearly maximum pensionable earnings under CPP plus 19.05% of monthly Basic Earnings in excess of 1/12 of the current yearly maximum pensionable earnings under CPP
<b>Elimination Period</b>	Six months. The Employee must complete the Elimination Period prior to Normal Retirement
<b>Maximum Benefit Period</b>	Date of early retirement or Normal Retirement



<b>Termination Age</b>	Coverage will cease on the date of early retirement or the date an Employee reaches Normal Retirement
<b>Tax Status</b>	Benefit payments from the Plan are not taxable as income as Employees pay 100% of the premium cost.

## **Section 1**

In this section appear definitions, conditions, and provisions relating to the benefits under this Plan.

### **Definitions**

Reference to the singular also includes the plural when the context so requires.

#### **Accident or Accidentally**

means an unexpected or unforeseen happening or event involving an external force, causing loss or Injury, independently of all other causes.

#### **Actively at work, Actively employed or Active employment**

means attendance at the Employee's usual place of employment with the University of Victoria ("The University"), performing normal duties for a normal working day or shift, or on paid vacation or statutory holiday or on a regular non-working day and capable of being at work. If an Employee is not required to report for work, he or she shall be considered Actively employed provided he or she is not confined to a Hospital nor Disabled to the degree that he or she cannot perform all of the usual and customary duties of his or her occupation. It does not mean:

- employment where the Employee does not meet the eligibility or Waiting Period requirements specified in Appendix I or the *Benefit Details*
- employment not at the usual place of employment or business unless at a location to which the business requires the Employee to travel.

#### **ASO Contract**

means a contract between BC Life and Casualty Company (BC Life) and the Plan Sponsor ("The Board of Trustees") under which BC Life, acting as agent of the Plan Sponsor, agrees to provide certain administrative services with respect to the Plan Sponsor's long term disability plan without assuming the Plan Sponsor liabilities. The ASO Contract number relating to the Plan is 41071.

#### **Basic Earnings**

means the amount the Employee normally earns on a regular, formal basis from employment with the University at the date of the first LTD benefit payment. Additional income earned from bonuses, commission and overtime is excluded.

Annual basic earnings for an Employee who is subject to lay-off, or whose hours and earnings fluctuate, is based on the Employee's regular Basic Earnings in the 12 month period prior to the date of the LTD claim, excluding overtime and bonuses. If the Employee has worked less than 12 months for the Employer, an average will be calculated for the period employed.

The Employee's T4/T4A slips may be required as Proof. If any discrepancy arises, premium levels will be adjusted and backdated accordingly. It does not include income from dividends, profit sharing, and deferred compensation.

#### **Benefit Amount**

means the scheduled amount of benefit for which the Employee is eligible as of the date of the first benefit payment, as indicated in the *Benefit Details*.

**Benefit Period**

means the period of time, after the Elimination Period, during which a Benefit Amount is payable, as indicated in the *Benefit Details*.

**Business Information**

means information about the University's business, employment practices and benefits activity, and includes information about individuals which is anonymous and aggregated in statistical form, but excludes Personal Information.

**COLA**

means Cost of Living Adjustment.

**CPI**

means the all item Consumer Price Index Canada.

**CPP**

means Canada Pension Plan.

**Disabled or Disability**

means an Employee who is wholly and continuously disabled due to Sickness or Injury and as a result is unable to perform the duties of his or her normal occupation or the duties of any occupation for which he or she is fitted by education, training or experience. Availability of work is not considered when assessing Disability. The Employee must be receiving from a Physician, care that is appropriate for the condition causing the Disability.

**Elimination Period***Classes 12 and 19*

means the period of continuous and total Disability which must be completed before any Benefit Amount becomes payable, as indicated in the *Benefit Details*, unless as otherwise specified in the benefit description. If the employee attempts a return to work for a cumulative total of 90 days or less during this period, the days the employee has returned to work will also be accumulated to satisfy the elimination period if the disability continues to result from the same injury or sickness. Each full or partial return to work day will be counted as 1 day in the cumulative total.

*Classes 11, 13, 20, 21, 25, 93, 94, 97 Effective July 1, 2010*

means the period of total disability which must be completed before any Benefit Amount becomes payable, as indicated in the *Benefit Details*. If the employee attempts a return to work for a cumulative total of six weeks (30 working days) or less during this period, the days the employee has returned to work will also be accumulated to satisfy the elimination period if the disability continues to result from the same injury or sickness. Each full or partial return to work day will be counted as 1 day in the cumulative total.

**Employee**

means an Employee employed by the University who continues to meet the eligibility requirements as described in Appendix I and the *Benefit Details*. This includes individuals who are:

- directly employed by and compensated for services by the University

- Employees of any corporation or other business organization associated or affiliated with the University as a subsidiary or otherwise, who are appointed and paid through the University payroll.

It does not include Employees who choose to work past the Normal Retirement Date, those already retired, or individuals employed on a casual basis.

**Employer**

means the University of Victoria.

**Gross Monthly Benefit Amount**

means the Employee's monthly Benefit Amount before any reduction for other income benefits and earnings.

**Hospital**

means an institution operated pursuant to law for the care and treatment of sick and injured persons, with organized facilities for diagnosis and major surgery, and 24-hour nursing services.

**Indexed Pre-disability Earnings**

means the Employee's Basic Earnings, adjusted on the first anniversary of the LTD benefit payments and each following anniversary by the lesser of 10% of the current annual percentage increase in the CPI. If the CPI is no longer available in its present form, a similar measurement will be used.

**Injury**

means accidental bodily injury resulting solely and directly from external, violent, and accidental means and independent of all other causes.

**Increased Amount of Insurance**

means an Employee's additional amount of LTD Insurance which may have increased due to a change in the maximum Benefit Amount.

**LTD**

means Long Term Disability.

**Net Earnings**

means basic gross earnings less federal and provincial income taxes, Employee contributions to an Employer pension plan, Employment Insurance and Canada Pension Plan as deducted from pay at source.

**Normal Retirement Date**

means June 30 coinciding with or following the Employee's 65th birthday.

**Personal Information**

means any information about an identifiable individual.

**Physician**

means an individual who is duly qualified and licensed to practice medicine or surgery, or both, in the area where the services are provided and is acting within the scope of that license, but excludes a Physician residing with or related to the Employee.

**Plan**

means the program of long term disability benefits set out in this document.

**Plan Administrator**

means BC Life and Casualty Company.

**Plan Sponsor**

means The Board of Trustees of the Long Term Disability Plan for Faculty, Librarians and Professional Employees of the University of Victoria.

**Proof**

means written evidence that verifies the circumstances of an event or establishes a fact and which:

- the Plan Administrator approves as written evidence that verifies the circumstances of an event or establishes a fact;
- must be received at the office designated by the Plan Administrator
- must be on the forms designated by the Plan Administrator

**QPP**

means Quebec Pension Plan.

**Rehabilitation Program**

means one or more activities, recommended by the Plan Administrator and agreed to by the Employee's Physician which can be expected to facilitate a Disabled Employee's return to gainful employment.

**Rehabilitation Income**

means income which the Employee receives for work performed under a Rehabilitation Program, including self employed income.

**Sickness**

means illness or disease.

**University**

means the University of Victoria.

**Waiting Period**

means a period of continuous employment in an eligible class with the University, after which the Employee becomes eligible for coverage, as indicated in the *Benefit Details*.

## **Section 2**

### **General Conditions of Coverage**

#### **Eligibility for Coverage**

An Employee will be eligible for the coverage specified in the *Benefit Details* provided the Employee:

- is Actively employed;
- is under the Normal Retirement age less the Elimination Period; and
- has provided the University with a written application.

#### **Commencement of Coverage**

An Employee's coverage commences on the first day of the month coincident with or next following the appointment, as outlined in the *Benefit Details*, provided the Employee is Actively at work on that date.

#### **Change of Coverage**

A change in an Employee's coverage will commence on the first day the Employee is Actively employed coincident with or immediately following the date the Employee is eligible for such change. However, if an Employee is on a paid medical leave of absence at the time he or she becomes eligible for a change in coverage due to a salary increase, the Actively at work requirement shall be waived and the amount of income applied for the calculation of coverage amounts shall reflect the increases implemented while not Actively at work.

For the purpose of applying the provisions of this section only, an Employee is considered to be Actively Working while on vacation, provided the Employee is not confined to a Hospital or Disabled due to Sickness or Injury.

#### **Proof of Age**

The Plan Administrator may require a person to submit Proof of his or her age;

If an Employee's age has been misstated and misstatement affects:

- the date on which the Employee's coverage commences or ceases; or
- any rights or benefits provided under this Plan,

the correct age governs, and the Employee's coverage will be adjusted accordingly.

#### **Workers' Compensation**

This Plan is not in lieu of, and does not affect, any requirement for coverage by Workers' Compensation insurance.

#### **Termination of Coverage**

If an Employee is not in receipt of an LTD benefit under this Plan, the Employee's coverage will cease, except as specified under *Extension of Coverage*, on the date on which the earliest of the following events occurs:

- the benefit terminates under this Plan, or coverage for the group, division or class to which the Employee belongs terminates.

- the Employee attains the termination age stated in the Benefit Details.
- the Employee commences active duty in the armed forces of any country, state, or international organization
- the Employee fails to pay the required Employee premium payments
- the Employee no longer satisfies the definition of Employee
- the Employee is not Actively employed
- the Employee ceases to be in an eligible class
- ASO Contract 41071 terminates
- the Employee retires
- the Employee reaches Normal Retirement Date less the Elimination Period
- the Employee dies
- the University terminates the Employee's coverage

If, on the date an Employee's LTD benefit ceases under the *Termination of Benefits* provision, any of the above listed events have occurred, the Employee's coverage will cease, except as specified under *Extension of Coverage*.

### **Extension of Coverage**

Coverage for an Employee is extended as follows:

- an Employee on approved sick leave may be covered until he or she recovers, provided the University agrees to such an extension
- an Employee whose regular employment includes annual periods of layoff with a predetermined recall date, coverage will continue during the layoff period with no premium payments required, provided the University agrees to such an extension. Any Disability benefits payable will be based on the Employee's Basic Earnings
- an Employee who is on vacation, may have his or her coverage extended, provided the University agrees to such an extension
- an Employee who is on an approved leave of absence (other than for parental or maternity), or on a Recall List, may have his or her coverage extended provided the University agrees to such an extension
- an Employee who is on parental or maternity leave of absence may be covered for the duration of the leave provided the University agrees to such an extension.
- where an Employee becomes Disabled while on leave of absence, seasonal lay-off or maternity or parental leave, benefits will not be payable until the later of the end of the Elimination Period or the scheduled return to work date
- an Employee's coverage under this Plan will only continue if the Employer acting in accordance with the rules precluding individual selection, continues the Employee's coverage and the Employee continues to make premium payments to the Plan during the leave.

- if the benefit extension permitted under this section is less than the minimum required by governing legislation, the terms of the Plan will be extended to agree with the minimum required of such law

In no event will benefits extend beyond the termination of ASO Contract 41071.

### **Payment of Premiums**

Each Employee who is covered under the Plan in accordance with this Section 2 must pay the required Employee premiums at the rate set by the Plan Sponsor, provided that:

- pursuant to the *Extension of Coverage* provision, no premium payments are required during certain annual periods of layoff; and
- pursuant to the *Waiver of LTD Premium* provision, no premium payments are required to be made by an Employee in receipt of an LTD benefit under this Plan.

Employees shall pay such premiums by means of payroll deduction. The University shall remit the premiums to the LTD Trust Fund at least monthly.



## **Section 3**

### **Benefit Provisions**

#### **Claim Procedure**

- The Plan Administrator must receive written notice of claim within 6 months of the date Disability began.
- The Plan Administrator must receive Proof of claim within 12 months of the date Disability began.
- The claimant must provide information required to prove their claim and must also authorize the Plan Administrator to obtain information from other sources for this purpose. Whenever the Plan Administrator requests information or authorization, it must be submitted to the Plan Administrator within 6 months. If it is not submitted within this time, the Trust will not be liable for any further Benefits.
- Proof of claim is at the Employee's expense.
- While an Employee is receiving benefits, the Plan Administrator may require further Proof of ongoing Disability, and the Plan Administrator shall have the right to require a claimant to undergo a physical or mental evaluation when and as often as may be reasonably necessary.
- No legal action for the recovery of any claim may be brought against the Plan Sponsor within 60 days or after 3 years from the expiration of the time in which the Proof is required.
- If the terms of the Plan for filing Proof of claim or bringing any legal action are less than that permitted by applicable law, the Plan provisions will be extended to agree with the law.

#### **Claim Payments**

- When the Plan Administrator accepts Proof of an Employee's claim, the Employee's benefit will be determined in accordance with the provision of the Plan.
- Claim payments are made payable to the Employee and will ordinarily be sent directly to the Employee or deposited directly to the Employee's bank account, at the Employee's option.
- If the Employee dies before all benefits have been paid, the remaining benefits to which the Employee was entitled prior to his or her death will be paid to the Employee's estate.
- No claims will be paid by BC Life after ASO Contract 41071 is terminated.

#### **Overpayment**

If an Employee's benefits are overpaid the Employee is responsible for repayment within 6 months, or within a longer period if agreed to by the Plan Sponsor. If the Employee fails to fulfill this responsibility, further Benefits will be withheld until the overpayment is recovered. This does not limit the Plan Sponsor's right to use other legal means to recover the overpayment.

#### **Source of Benefit Payments**

Benefits payable to Employees whose claims have been assessed as qualified are paid by the Plan Administrator, and that company is reimbursed for these payments out of a separate LTD University

ledger account. Into this account are transferred Employee premium payments deducted by the University from payroll, and these premiums provide the entire funding for the reimbursement. Premium monies in this account are meanwhile invested in University pooled funds. However, in order to ensure that *Income Tax Act (Canada)* requirements are met for the non-taxable status of LTD payments in the Employee claimant's hands, this LTD Trust is being created by the University which will be the sole recipient of all deducted premiums. No other monies except Employee premiums will be held in the Trust Fund, the University will not be entitled to any monies in the Fund, and the Fund will be separately invested.

Those Employees who are receiving claim payments prior to July 1, 2007, will continue to receive those payments from the Plan Administrator, and that company will continue to be reimbursed out of the monies in the University ledger account. When those account monies are exhausted, the Plan Administrator will then be reimbursed out of the LTD Trust Fund, and Employees will then appear in the LTD Trust records as persons on behalf of whom reimbursements have been made to the Plan Administrator.

Employees whose claims are made and assessed as qualified as of July 1, 2007 forward, will be paid by the Plan Administrator, and that company will be reimbursed for those claims out of the LTD Trust Fund. The names of those claimants will therefore appear at once in the LTD Trust records as persons on behalf of whom reimbursements have been made to the Plan Administrator.

In the above manner, it is intended that there will be a seamless transition for all Employees and the Plan Administrator from the present University ledger account to the LTD Trust Fund.

### **Third Party Liability**

No benefits are payable under this Plan if an Employee has the right to recover money from a third party or their insurer as compensation for Injury or Sickness. However, if liability has not yet been determined, then an Employee may apply to use an advance payment of any benefits, which the Employee may ultimately be entitled to receive under this Plan.

The Plan Administrator shall make no advance payment of benefits unless the Employee is otherwise eligible to receive benefits and the Employee agrees in writing:

- to take all necessary action to recover from the third party the total of the benefits advanced by the Plan Administrator.
- to direct the third party, their insurer, or the Employee's lawyer to pay to the Plan Administrator from any judgment or settlement obtained from or on behalf of the third party an amount equal to the total amount of money advanced by the Plan Administrator.
- that any judgment or settlement obtained from or on behalf of the third party that does not specify an amount for wage loss shall be deemed to include wage loss in an amount equal to the benefits advanced by the Plan Administrator.
- to pay all legal fees incurred in pursuing any claim against the third party.
- to enter into a Reimbursement Agreement with the Plan Administrator establishing the terms and conditions for repayment of benefits advanced.
- to repay to the Plan Administrator the full amount of benefits advanced to the Employee in the event the claim against the third party is abandoned or settled without the Plan Administrator's written consent.
- to irrevocably authorize the third party, or their insurer, to release to the Plan Administrator all information in their possession relating to the Employee's claim including full particulars of any settlement or judgment.

- to authorize the third party's insurer to pay directly to the Plan Administrator from any settlement of judgment an amount equal to the benefits advanced by the Plan Administrator.

If the Employee fails to comply with the provision outlined above, then the Plan Administrator may terminate the advance payment of benefits.

An Employee may make no further claims for benefits arising out of any Injury or Sickness for which monies are paid by or on behalf of a third party after the Employee has entered into a settlement with or obtained judgment against the third party.

### **Appeals**

An Employee has the right to appeal a denial of all or part of the benefits described in the Plan as long as the Employee does so within two years after the denial.

### **Exclusions**

No benefit is payable when any of the following situations occur:

- the Employee is not under continuing medical supervision and treatment considered satisfactory by the Plan Administrator.
- any period after the Employee fails to participate or cooperate in a Rehabilitation Program that has been recommended or approved by Plan Administrator.
- Disability is due to intentional self-inflicted Injury or Sickness while sane or insane.
- Disability is due to bodily Injury resulting directly or indirectly from war, whether declared or undeclared, or any act of war or participation in a riot, insurrection or civil commotion.
- Disability is due to voluntary participation in a riot or civil commotion except while an Employee is in the course of performing the duties of his or her occupation.
- the Employee is on maternity or parental leave of absence or could be placed on such leave by the University according to any maternity or parental leave provisions in the relevant government legislation. An Employee who becomes Disabled due to any cause prior to such leave of absence is eligible for benefits. However, once such Disability extends into the leave of absence, benefits are suspended for the duration of the maternity or parental leave. Any portion of the maternity or parental leave of absence subsequent to the onset of Disability will be applied towards completing the Elimination Period. An Employee who is unable because of Disability to return to work as scheduled after a maternity or parental leave of absence, whether such Disability arose prior to or during the leave of absence, will become eligible for commencement or continuation of benefit payments on his or her scheduled return to work date, provided the Employee is otherwise eligible for benefits. If an Employee fails to qualify for maternity or parental leave of absence because of failure to meet the length of service requirements in the relevant government legislation, benefits will not be payable for Disability due to any cause during any leave of absence agreed upon by the University and Employee or after the date the Employee's coverage ceases.
- Disability is related to any condition, which commenced prior to the date the Employee became covered under this Plan and for which the Employee received treatment within the 3 months immediately preceding the date coverage began. This limitation will not apply after such Employee has been Actively at work and covered under this Plan for 12 consecutive months.

- An Employee who must hold a government permit or license to perform his or her duties will not be considered Disabled solely because such permit or license has been withdrawn or not renewed.

### **Payment of Benefit**

Total Disability must begin while the Employee is covered under the Plan. The Elimination Period will commence with and be calculated from the date Disability starts. Payment for a period of less than one month will be prorated. The monthly Benefit Amount, the prorate and the Elimination Period are shown in the *Benefit Details*.

Following the expiration of the Elimination Period benefits will be paid to the Employee semi-monthly on the 15<sup>th</sup> and last day of the month for any period for which the Plan Administrator is required to make payment.

### **Pension Contribution**

In order to continue a Disabled Employee's participation in the University's pension plan, the Plan Administrator will send the monthly pension contribution to the University. This contribution is payable only while the Employee is entitled to receive the monthly benefit, as specified under the *Benefit Details*. The amount of monthly pension contribution is specified under the *Benefit Details*. This contribution will be modified by the COLA described under *Benefit Details*.

### **Application for CPP Disability Benefits**

Based on the medical evidence provided, the Plan Administrator will determine if and when it is appropriate for an Employee to apply for Canada Pension Plan Disability Benefits. The Employee will be required to make application for such benefits as requested. This will ensure that the Plan does not inadvertently pay for benefits that would otherwise be available from a government source. Offset calculations will be in accordance with the integration provisions of each Plan as outlined below.

### **Calculation and Integration of Benefit Amount**

- To calculate the Monthly Benefit Amount payable multiply the Employee's monthly Basic Earnings by the benefit percentage shown in the *Benefit Details*.
- Deduct the following direct offsets from the amount determined above:
  - any Disability or retirement benefit under the Canada or Quebec Pension Plan (or any similar Plan or act), excluding those public pension plan disability benefits payable to the Employee on behalf of his or her Dependent children. An amount equal to 73% of such benefits will be applied to reduce the monthly Benefit Amount payable under this Plan
  - benefits under the Worker's Compensation Act or similar legislation
  - any loss of time, salary continuance, Disability, or retirement benefit the University provides or arranges
  - earnings or payments from any employer
  - any other group Disability insurance Plan (including a Plan under which the Employee is insured because he or she belongs to an association)
  - any income replacement indemnity payable under any automobile insurance Plan or policy (including any government legislated no-fault auto insurance)

- Disability benefits payable under any other government Plan excluding Employment Insurance benefits.
- The monthly Benefit Amount will be reduced by the following benefits or payments resulting from the Employee's Disability if, on or after the date the Employee becomes Disabled, the Employee begins to receive such benefits or payments, or would be entitled to receive them had the Employee made satisfactory application:
  - the amount equal to 73% of any Disability or retirement benefits payable under the Canada/Quebec Pension Plan (or any other public pension plan) will be applied to reduce the monthly Benefit Amount
  - the amount by which any benefits payable under a public pension plan to the Employee on behalf of his/her Dependent children exceed the applicable percentage of Basic Earnings (adjusted in accordance with the subsequent changes in the Consumer Price Index) as shown in the table below:

<b>Number of Dependent Children</b>	<b>Employees Earning Less Than \$10,000 Annually</b>	<b>Employees Earning \$10,000 and Over Annually</b>
1	10%	5%
2	13%	8%
3	16%	11%
4	19%	14%
5 and more	20%	15%

- When determining the amount of such income the following will apply:
  - any of these benefits which are not payable on a monthly basis, will be converted to a monthly basis
  - any government awards which have not been determined by the time this benefit is payable will be estimated
  - the monthly benefit for a Disabled Employee who attains age 65 while receiving Plan Benefits, will be calculated using the same offset for Disability benefits payable under the Canada Pension Plan or Quebec Pension Plan which applied prior to his or her 65<sup>th</sup> birthday. No adjustment will be made for the remaining Benefit Period to account for the change to retirement benefits provided by the government
  - any change due to a cost of living increase will not be taken into account.

### **Pregnancy**

A Disability which is due in whole or in part to pregnancy will have benefits payable on the same basis as any other Sickness, provided that no benefits will be payable:

- during any period of formal maternity leave and/or parental leave taken by the Employee pursuant to provincial or federal law or pursuant to mutual agreement between the Employee and the Plan Sponsor.
- During any period for which the Employee is paid or is eligible to be paid Employment Insurance maternity and/or parental leave benefits.

### **Preexisting Conditions**

Preexisting condition means a Sickness or Injury for which the Employee received medical treatment, consultation, care or services (including diagnostic measures), or consumed prescribed drugs within 3 months:

- Prior to his or her effective date under this benefit, or
- Prior to the effective date of any Increased Amount of Insurance.

This Plan does not provide an LTD benefit or an Increased Amount of Insurance for any Disability caused by, contributed to by, or resulting from a Preexisting condition, with the following exceptions:

- this exclusion will not apply to a Disability which commences more than 12 months after:
  - the Employee's effective date under this benefit, or
  - the effective date of the Increased Amount of Insurance

### **Recurrent Disability**

Benefit payments will be subject to the terms of this Plan for the prior Disability.

*Classes 11, 12, 19, 21, 25, 93, 94, 97*

If an Employee returns to any occupation for normal duties for 6 months or more, a Recurrent Disability will be treated as a new period of Disability. The Employee must complete another Elimination Period. To prevent over insurance because of duplication of benefits, a Benefit Amount payable under this *Recurrent Disability* provision will cease if benefits are payable to the Employee under any other group long term disability policy.

*Classes 13 and 20 Effective July 1, 2019*

If an Employee returns to any occupation for normal duties for 12 months or more, a Recurrent Disability will be treated as a new period of Disability. The Employee must complete another Elimination Period. To prevent over insurance because of duplication of benefits, a Benefit Amount payable under this *Recurrent Disability* provision will cease if benefits are payable to the Employee under any other group long term disability policy.

If the Disability is considered to be recurrent, the monthly benefit is subject to all of the provisions of this benefit with the following exceptions:

- the Employee is entitled to benefit payments on the date the Disability recurred
- the monthly benefit will be based upon the same earnings level as at the original date of Disability.
- An Employee's Disability can be considered to be a recurrence of his or her previous Disability provided the subsequent Disability is due to an Injury or Sickness directly related to the causes of the immediately preceding Disability.
- If the Employee was involved in a Rehabilitation Program or rehabilitative employment, as specified under *Rehabilitation Program*, and:
  - subsequently becomes Disabled due to an Injury or Sickness directly related to the causes of the immediately preceding Disability, or

- was unable to continue in such program or employment because of the Disability for which he or she received Benefits under the Plan, then, for the purposes of this provision, the Employee's Disability will be considered recurrent.

### **Rehabilitation/Return to Work Program**

The Rehabilitation/Return to Work program is designed to help Disabled Employees return to gainful employment, and wherever possible to resume his or her normal duties. The program requires the Plan Administrator's pre-approval and the agreement of the attending Physician. It may include (but is not limited to) any of the following:

- a return to work on a part-time or full-time basis
- therapy and counselling
- vocational evaluation
- job preparation

In considering whether a Rehabilitation Program is appropriate, the Plan Administrator will assess such factors as the expected duration of Disability, and the level of activity required to facilitate the earliest possible return to employment. Income received under the Rehabilitation Program will be integrated, as described under *Calculation and Integration of Benefit Amount*, when calculating the Employee's monthly benefit payment.

A Disabled Employee who is involved in a Rehabilitation Program or employment where such program or employment is considered appropriate for rehabilitation purposes by the Plan Administrator, will not have his or her monthly Benefits terminated but continued as follows:

- total income from all sources cannot exceed 90% of the Employee's Net Earnings, as outlined in the *Benefit Details* at the date Disability commenced, and will be adjusted for subsequent changes in the Cost of Living
- Benefits will be paid for a maximum of 24 months.

If the Employee cannot continue in such Rehabilitation Program or employment due to his or her Disability, the Employee will again be subject to the regular provisions of this benefit.

### **Waiver of LTD Premium**

The Trust will waive the premium for the LTD coverage of an Employee to whom LTD benefits became payable under this Plan, commencing with the premium for the first full calendar month for which benefits became payable. This waiver of premium will continue until the date the Employee's monthly benefit payments cease. Coverage under this benefit will be reinstated when the Employee is again Actively at work and premium payments are resumed.

### **Termination of Benefit**

Monthly Benefit payments will cease on the earliest date one or more of the following occurs:

- the Employee ceases to be Disabled.
- the Employee is no longer receiving, from the attending Physician, regular medical care and treatment that the Plan Administrator considers satisfactory.
- the Employee fails to submit Proof, satisfactory to the Plan Administrator, of the continuance of Disability.

- the Employee refuses a medical examination by a Physician chosen by the Plan Administrator.
- the Employee is no longer following the treatment recommended for the Disability.
- the Employee refuses to participate in the Rehabilitation Program.
- the Employee's current earnings exceed the percentage allowed under this Plan.
- the Employee attains the Termination Age specified in the *Benefit Details*.
- the end of the maximum Benefit Period specified in the *Benefit Details*.
- the Employee dies.



## **APPENDIX 1 – Eligible Employee Groups and Participation**

<b>Long Term Disability Plan</b>
Executive - regular and term (class 11) – required participation
Faculty - regular (class 12) – required participation
Administrative and Academic Professional - regular and regular sessional (class 13) required participation
Professional librarians - continuing (class 19) – required participation
Management Excluded - continuing (class 20) – required participation
Physicians - continuing (class 21) – required participation
External Management (class 25) – voluntary participation
TRIUMF Engineers & Technicians (class 93) – required participation
TRIUMF Research Scientists (class 94) – required participation
Agency Management - (class 97) – voluntary participation