

External Reviewer's Recommendations

For the
Institute of Island Studies
University of Prince Edward Island

Discussion of the three reviewers for the IIS was held in Toronto on September 4th, 2013. The discussion centered on the report of L. Vasseur to examine the various components that are agreed by the three reviewers for more consistency.

Director: shall be a faculty member with one course to have connection with the graduate program. The director needs to be connected to researchers and the academic system including graduate students.

The university must move fast on the restructuring and new initiatives of IIS.

We also agreed that the public meeting should be held soon: showing clear steps forward

Agreements: we went over the recommendations in L. Vasseur report and added/modified/clarified some of them in function of the information the three reviewers had.

Recommendations

Based on the results of our visits, the reviewers offer the following recommendations:

1. The Institute of Island Studies should continue to exist and this should be the first statement made during the public meeting. However, the current structure is not completely adequate and would need to be revised in light of budget constraints and the need for sustainability of the IIS (see following recommendations).
2. Regarding the mandate of the IIS, the four points should remain. There needs however to be a strategic plan prepared on a three year basis, with annual action plans being developed by the membership (see recommendations #5 and 7), not only the director. The plan should be a collaborative work and can be presented to the advisory council during an annual meeting. At the present, it is clear that the IIS was attempting to be all things to everyone. This current model is unsustainable and way too much of a burden is put on a single person.
3. During the visit, on several occasions, participants underlined the importance of the IIS as an honest broker. Several members of the community nostalgically described one activity that seemed to have been discontinued called "policy forum". This type of activity should be discussed among the membership of the IIS and specific funding should be set aside to reinstate such events. It appeared that

the reports presented in these events were well done and helped participants better understand a specific policy issue (as honest broker, i.e. policy relevant). Other activities should also be examined to maintain the strong connection with the community that currently exists.

Considering some of the actions and statements in the recent years suggesting a greater role in advocacy and activism, there is a concern about the credibility of the IIS. The IIS should go back to its original mandate of being the honest broker by ensuring that at the membership level as well as in the advisory council, participants understand their roles and responsibilities. The University should through its consultation process develop specific terms of references for all components of the IIS, especially the advisory council. IIS researchers and decision-making body (see recommendation 6) should have the authority to do science and make decisions on activities. The advisory council should be giving advice on potential research and policy issues and recommend places for funding. They are not in a governance role.

4. Considering the importance of external funding to maintain the IIS, the directorship should be a faculty member, potentially a new CRC Tier 1 in Island Studies who 1) is released from most of his/her teaching load, possibly keeping a course in MAIS to have a link with the students, 2) has a mandate of directing the IIS with a strong strategic plan (see recommendation #3), and 3) has access, especially in the first five years, to additional funding to enhance the capacity of the IIS (see recommendation #13). The term of the director should be precise (e.g. five years) with a clear mandate and possibility for renewal. The director should be evaluated on a regular basis as expected under the UPEI policies.

5. The current governance structure does not position the IIS to be strategic in terms of activities and involvement of faculty members. The reason for having a structure with members and affiliates or associates is that when it is time to make decision, the faculty members who will be required to live with the consequences of the decisions should be voting member. The idea is to remain inclusive while having a structure that provides control. The structure should include various levels of membership that allow for recognition and greater interactions. There should be an internal membership for faculty members and research librarians interested in participating in activities and research of the IIS. The second category would include associate members who would be either faculty associate members from other universities or research institutions or students from programs such as MAIS. A third category would include the affiliate members who can be individuals or organizations from outside the university and who have a great interest in participating and working with the members of the IIS on specific projects or activities. It is also possible to keep it simpler by having only affiliates but in all cases, there needs to be regular meetings to make sure that there is a sense of ownership among members.

6. To ensure transparency and a stronger direction for the IIS, there should be an executive committee (or board of directors), which would include at least (but not limited to) the coordinator of MAIS, a student representative, and at least two faculty members from the membership. This committee would be responsible to support the managerial and administrative components of the IIS. This executive committee could be chaired by the director who can then report and bring issues to be voted on in these regards. Minutes of these meetings should then be circulated to the membership at large for greater transparency. Such a committee would need to meet at least every three months (or more depending on issues and activities). The roles and responsibilities as well as the procedures of this executive committee would have to be clearly defined early in its establishment. The membership on the executive committee should be well defined with specific terms. Furthermore, the administration of

UPEI should ensure that IIS annual reports and review of IIS positions be completed in compliance with the current policies.

7. The membership should be able to meet at least twice a year to exchange, share information, define strategic actions for the IIS. At one of the meetings, the action plan and the strategic plan should be discussed and approved.

8. With a strong membership and an executive committee, the advisory council should then be able to play its appropriate role of advising the IIS mainly through strategic planning. Such a committee should not have more than six to eight people who represent various sectors of society including governments, industry, non-governmental organisations, etc. These people should be able to help the director in seeking opportunities for research, funding and policy contributions. There should not be any other UPEI representation except for the director and an assistant for note taking. Having faculty as members of the Advisory Council defies the role of an advisory council. Faculty members should be provided a role of observer status at the advisory committee if desired (Faculty will be able to participate in IIS activities through committees and research). The roles, responsibilities, procedures, and term appointment procedures of such an advisory council will have to be developed in consultation with partners and should be reviewed on a regular basis, i.e. during an annual meeting. For example, the term should be three years with the possibility for renewal for another term.

9. According to some documents, there were various committees on which members of the advisory council (it seems) served. This model is not very effective and in fact inappropriate and again dilutes the advisory nature of the council. Committees should be established at the membership level to involve as many members as possible. In addition to the executive committee, other committees could include one for communication, another one for internationalization, one for policy forum, etc. Again the term, roles and responsibilities should be clearly defined. Reporting of these committees to the executive committee should be done at each meeting. The annual report of the IIS should include a summary of the activities of each committee.

10. Although there was strong support for the IIS from a number of Faculty during our review, there needs to be greater official buy-in in the IIS from faculty members at UPEI. Understanding that the number of faculty members working in the field of island studies is limited but knowing that the IIS thrives as an interdisciplinary institute, faculty members should be encouraged to become members or associates of the IIS and welcomed on various projects. Under the previous directorship, it appeared that most projects were led and managed by the director. This is fine when there are only a few projects. However to be successful, like the Harris Centre at MUN, for example, the IIS will most likely need to increase its participation in larger initiatives and rely on several more members. This should also be acknowledged in the annual reports of the IIS and the individual faculty members (see recommendation #11 for an additional incentive for faculty members).

11. In order to motivate and engage faculty members in doing research, especially within an institute or centre, there needs to be an incentive. Some of the most productive incentives that one reviewer experienced as a researcher and as an administrator, are recognition as a leader in a project and the possibility of overhead sharing from contract research and contribution agreements (not to mix with indirect costs of research coming from the federal granting agencies which must be spent according to specific rules and cannot be given directly to people). The current UPEI policy stipulates that 50% goes to central revenue and 50% to the dean. Not knowing how the dean distributes the 50%, the reviewer recommends that for contracts coming from researchers who are members of the IIS and applying with

an IIS affiliation, a certain percentage should be given to the faculty member directly and remaining funds secured for the general administrative purposes of the IIS. Even if both parties received 10 or 15% each, this may significantly help motivate members to seek funding and improve the financial sustainability of the IIS.

12. To ensure cohesion within the IIS and the MAIS and the undergraduate programs related to IS, students should be invited to become associates or affiliates of the IIS and activities should be organised by the MAIS coordinator in collaboration with members of the IIS (not necessarily the director). These activities should help increase the number of connections between faculty members and students and help them find an appropriate thesis supervisor(s). The director, however, should be invited to teach at least one course in order to maintain his/her connection with the students.

13. Acknowledging that UPEI is currently in a difficult financial situation but considering its vision document and upcoming strategic plan, the reviewers strongly recommend the allocation of a specific budget for the IIS which should cover at a minimum the course release for the director, the salary for a full time administrative assistant who would be in charge of the IIS and Island Press, funding to accomplish a few activities (see recommendation #14), and administrative funds for 3-5 years. It should be understood that this represents an initial funding with the goal that through advancement (see recommendation #15), fundraising and successful grant/funding applications (see recommendations #11 and #16), the IIS should become sustainable without substantial funding from UPEI. The CRC Tier 1 opportunity should be reworked to focus on Island Studies with only one course to teach to keep connection with the students. The CRC posting should be as soon as possible for an intake ideally next summer.

15. Considering the upcoming strategic plan and fundraising campaign, it is strongly recommended that advancement works closely with the director and the executive committee of the IIS and consult with the advisory council to develop a fundraising strategy and ensure that endowed funds be obtained for the IIS. Short term efforts should be more strategic focussed on operations of the IIS. Subsequent efforts should then address establishment of a long term endowment to address financial sustainability for the IIS (e.g. once the CRC is finished in 10 years).

The long term survival of the IIS will depend heavily on its capacity to successfully apply for grants but also to be able to maintain a baseline funding that is not fluctuating in function of the university budget.

16. Seeking funding through grants will remain a large component of the IIS. However this role should not be limited to the director. The office of the VP Research and the advisory council should help support the efforts of the IIS in finding the appropriate agencies for specific projects. If there were an annual plan, this could be done in an effective manner. Considering the mandate of the IIS at the local, national and international levels, there should be three levels of funding, from provincial or municipal for more local projects, national through the more traditional federal agencies and ministries, and international.

17. The MAIS program appeared to be strengthening with the appointment of Dr. Jim Randall as coordinator. He has been very effective in modifying the procedures to ensure a better standard.

We are very supportive of the new initiatives implemented by UPEI regarding space allocation and resource support for the two programs. We encourage the continuation of strong communication between the coordinator (Dr. Randall) and the students as it has been happening in recent months.

MAIS appeared to be healthy in terms of number of students, although there was a concern regarding time to completion. It was clear that this issue was being addressed by Dr. Jim Randall. Faculty members should be taking students on in function of their workload and funding capacities. It seemed that students with no funding took more time to completion. On the other hand, there should be a very clear expectation that students in a Master program should be limited to two years of support. If the university does not have a policy for time to completion, the reviewers strongly suggest that it does so. Most universities in Ontario, for example, have a limit of three years to completion for a fulltime master student. As newly appointed coordinator of the minor in island studies, he will also require support (see recommendation #21).

18. A decline in number of students was mentioned by several participants (administrative, academic and community) as a concern for the sustainability of the programs like the minor in island studies and possibly the MAIS and the new major. The reviewers recommend that UPEI examines the possibility to develop two+two programs at the international level with other island universities. In such programs, students from another island university would be completing their first two years at their home institutions (and take ESL if needed) and would continue their last two years at UPEI. It is suggested that as this becomes a new source of revenue, a funding sharing formula could be developed so that some of the revenues back to the appropriate programs or to the IIS. Furthermore, with a fully functioning IIS, administration will be able to use the IIS brand to attract more students to the graduate program from across Canada and internationally.

19. With the stabilisation of the IIS and the other components including the possibility of a School (recommendation #20) and possible endowment through fundraising by advancement, the reviewers recommend that UPEI consider the possibility to nominate a faculty member as a UNESCO Chair in Island Studies. This would be the first UNESCO Chair in PEI and would lead to greater visibility at the international level. Unfortunately chairs in developed countries are not funded by UNESCO thus the endowment and other revenue generation activities should be secured first. A UNESCO Chair would also provide a useful framework for IIS fundraising.

20. Considering the size of the university and the interdisciplinary nature of some units such as the IIS, environmental studies, MAIS, Climate Lab, and UPEI should continue to examine the possibility of a **School of Island Studies and Sustainability** and develop a three to five year plan to make this a reality. The plan should include the steps to secure funding, process for the integration of the various components into the school, the governance structure of the school, its administrative support, etc. The school should have a faculty member as a director/chair with all the other units (IIS, MAIS, etc.) reporting to the director of the school and, in the case of the Climate Lab and IIS, also reporting to the VPR. All those consulted with during the review made it clear that if this type of initiative was to be acted upon, Island Studies should be the lead component so that it does not get diluted in a more generic term such as sustainability.

21. With the possible increase in strategic activities to ensure financial sustainability of the IIS and possibly a School, administrative support will become essential. The School should have two

administrative assistants to ensure functionality: one for the teaching components (minor, major and MAIS) and one for the research and outreach components (i.e. IIS, Island Press, Climate Lab, etc.). For the latter, see recommendation #13 and for the teaching component, see recommendation #18. Furthermore, the Vice Principle Research Office can help in promoting the interdisciplinary of the IIS as well as support more strongly research activities (e.g. applications, administration)

22. If the IIS remains independent as it is currently, the reviewers recommend that the reporting not only be done through the Dean of Arts but also through the VPR.

23. It appears that Island Press and the International Journal of Island Studies are doing well and it is recommended that they remain part of the IIS mandate. These are positive relationships that should be maintained. With a stronger structure, it is hoped that other faculty members will be interested in becoming more involved in these components. In the future, the governance of Island Press and the Journal should be re-examined to ensure its sustainability.

24. During the visit, another model that was suggested was the possibility of having Co-directors, one from UPEI and one from the community. We do not support this. With a strong advisory council, co-direction is not needed.

25. From the recent annual reports of the director, it appeared that the director was extremely involved in several local organizations, some not necessarily related with the mandate of the IIS. It is recommended that the director does not become a member of all the various associations that are interested in having the IIS as a member. It may be appropriate for the director to be an observer in additional organisations as suited. The decision should be made strategically, with a discussion at the level of the executive committee (with the possibility that other members of the IIS become the link) and in consultation with the advisory council. It is unclear, examining some of the reports, that the time of the director was wisely and strategically used to ensure that projects were carried out efficiently.

26. From both sides, community and university, discussions focused on the potential link between the IIS and the province for policy relevant research, although due to recent statements and advocacy issues of the IIS there were some hesitations. The reviewers suggest that discussions with the province take place relatively soon to develop a potential agreement for policy relevant research activities. The funding coming from this agreement should include support for research and the administration of the IIS. The reviewers are aware of at least one such other agreement in the Maritimes with annual funding. Such initiatives however, should not limit the role or visibility of IIS in other research or outreach initiatives.

27. One of the reviewers was provided with the process to nominate a CRC in sustainability and global environmental change. Considering the current climate of UPEI in regards to island studies and environmental studies and sustainability, the reviewers make the following suggestions: 1) rework the statements to start with islands as a major vulnerability point for environmental, climate and sustainability issues (this aspect seems diluted in the document), 2) reemphasize the interdisciplinary nature of this position, 3) indicate the high potential to connect with the IIS, Climate Lab, MAIS and environmental studies, and 4) underline the importance to work on PEI and global i.e. at international level. Due to the interdisciplinary nature of this CRC, and depending on the process used to establish a School, this may be another strategic point to emphasize.

28. The reviewers examined the Website for the IIS and associated linkages. It was clear that 1) the website was out of date, 2) some activities and events were irrelevant to the mandate of the IIS and there were few connections with the membership. Some information should also be removed as it may be misleading. Technical support should be provided, ideally under the coordination of a communication committee of the IIS, to first refurbish the website as soon as possible. Then through the communication committee, the site should be updated with relevant information on a regular basis. There should be a section on the site to celebrate members and their accomplishments instead of too much emphasis on the activities of the director. This should be carried out in the very short term to encourage students into the IIS Programs and to address misinformation on the site.

29. As a revenue generation option, the reviewers recommend to the executive of the IIS and with the active support of the administration to reintegrate continuing education as one of the initial activities of the IIS. With the availability of the current technology there is a huge potential for the IIS to become a focal point for on-line courses for either PEI communities or other island communities or universities. Considering that there is already an international network of island studies, this new role could be innovative and help enhance the sustainability of the IIS. Again this system would have to follow a revenue sharing stream.

30. It is recommended that UPEI maintains an active, transparent, and open line of communication with the internal and external communities in regards to the process being completed under this review and future changes in the organization and structure of the IIS. Given what we have seen and the belief that IIS should be continued but in a better way, the public meeting(s) will be crucial. To assist with this transparent approach, we suggest that a person from the faculty be appointed rapidly as an interim director and we believe that Dr. Randall may be the appropriate person to take this role on. The person will need support to administer the workload. In addition, the person should call a meeting of members (or potential members under the new governance structure) as soon as possible and encourage others to become members to discuss the recommendations and especially define with the administration the process to follow.

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