UNIVERSITY
of Prince Edward
ISLAND

Agenda of the meeting Senate of the University of Prince Edward Island held on
Friday, September 26, 2025, at 3:00 p.m. at Alumni Hall in Room 102.

Number	Title	Lead/Support	Type	Time
1.	Call to Order, Welcome, Land Acknowledgement and Opening Remark from Chair and Vice-Chair	W. Rodgers/ K. Mears	Information	3:00 – 3:02 pm
2.	Approval of Agenda **MOTION : *That the agenda of Senate for September 26, 2025, be approved***	W. Rodgers	Decision	3:02 – 3:03 pm
3.	Information Session on Action Plan Audit	T. Ferguson, Deloitte	Information	3:03 – 3 :32 pm
4.	Approval of minutes of May 2, 2025 ***MOTION: That Senate approve the open minutes of May 2, 2025, as circulated.***	W. Rodgers	Decision	3:32 – 3:34 pm
5.	Business Arising from the Minutes on May 2, 2025	W. Rodgers	Discussion	3:34 – 3:36 pm

6.	Senior Administration Reports
	        a. President's Report
	        b. Vice-President Academic and Research Report
	        c. Vice-President People and Culture Report
		a. W. Rodgers
		b. G. Naterer
		c. J. Ngobia
			Information	3:36 – 3:45 pm

7.	Strategic Enrolment Management	G. Naterer/ M. James	Discussion	3:45 – 4:04 pm

8.	Question Period
	        a. Questions and Answers Received from Placemats
	        b. Questions Received in Advance
	        c. Questions Received from the Floor
		W. Rodgers	Discussion	4:04 – 4:13 pm

9.	Reports from Standing Committees
	        a. Senate Steering and Nominating Committee
	        b. Academic Planning and Curriculum Committee
		a. W. Rodgers
		b. G. Naterer
			a.Information
			b. Decision
				4:13 – 4:22 pm

10.	Appointment of Senator to the Board of Governors	P. Robichaud	Decision	4:22 – 4:25 pm
11.	Report of the Board of Governors to Senate	W. Montelpare	Information	4:25 – 4:28 pm
12.	University Strategic Plan	W. Rodgers	Information	4:28 – 4:37 pm
13.	Policies on Harassment and Discrimination and Sexual Violence	W. Rodgers	Information	4:37 – 4:52 pm
14.	Shout outs	W. Rodgers	Discussion	4:52 – 4:55 pm
15.	Motion to Move to a Closed Agenda			4:55 – 5:00 pm
16.	Adjournment ***MOTION: That the Senate meeting be adjourned.***	W. Rodgers	Decision	5:00 pm

Circulated to Senators on September 19, 2025

Andrea Trowbridge, Secretary of Senate

NOTA: There will be a short orientation session open to all Senators but destined mostly to new Senators. The session will start at 2:30 in the same room as the meeting of Senate.

Approved Minutes of the Ninth Meeting of Senate
Friday, May 2, 2025
3:00 – 5:00pm
Alumni Hall and via Zoom

Present: A. MacKenzie, A. Hsiao, A. Trowbridge, B. Linkletter, B. Waterman, D. Moses, F. Sadat, G. Jiang, G. Naterer, H. Wang, J. Ngobia, J. Sentance, J. McIntyre, K. Gottschall-Pass, K. Mears, M. Sweeny-Nixon, M. A. McMahon, M. von Eccher, M. Turnbull, N. Mannholland, P. Bernard, P. Smith, R. Gauthier, R. Raiswell, , S. Fitzpatrick, S. Myers, S. Hamilton, T. Mady, T. Walker, W. Rodgers, W. Montelpare,

Regrets: D. Griffon, J. T. McClure, M. Clapson, M. Buote, R. Dennis, Y. Rashchupkina

Secretariat: P. Robichaud, K. Porter, W. Anderson

OPEN SESSION

1. **Call to Order, Welcome, Land Acknowledgement and Opening Remarks from Chair and Vice-Chair**
   W. Rodgers called the meeting to order at 3:00 pm and acknowledged the land.

2. **Approval of Agenda**
   After some discussion regarding the need to defer consideration of the Course Material Policy, it is agreed that the item will remain on the agenda for information, but that it may come up for more in-depth discussion at a future meeting of the Senate.

   MOTION: (J. McIntyre/ B. Waterman) that the agenda be approved as amended. CARRIED.

3. **Approval of Minutes**
   a. April 11, 2025, Open Minutes
   MOTION: (S. Fitzpatrick/W. Waterman) That Senate approve the minutes of the open session of Senate of March 14, 2025, as presented. CARRIED.

4. **Business Arising from Minutes**
   Following discussions at the previous meeting about the designation of Professor Emeriti as a gender-neutral version of Emeritus or Emerita and the grammatical incorrectness of such a term, the Committee on Emerita/Emeritus/Emeriti (sic) discussed the idea and landed on the possibility of using "Emirit". However, that solution is still grammatically problematic and other options need to be considered, including the use of an English term "Distinguishes". The Committee will continue its deliberations and come to the Senate with a recommendation at another meeting.

5. **Senior Administration Reports**
   a. **President's Report**
   President Rodgers welcomes new members of Senate, including new student senators and University Vice Presidents and thanked those whose term is ending. Lucianna Paredes is the new President of the UPEI Student Union and new Senator. Jane Ngobia and Tim Walker are new Vice President People and Culture and Administration and Finance, respectively.

   The President also noted continued work on the development of the University's Strategic Plan which is tracking towards a final version to be approved this Fall.

With the Province's late submission of its budget, our budget process was somewhat delayed this year. The University is required by Law to table a balanced budget, which cannot be done reasonably before the Province's funding is confirmed. We are now on track for budget approval on May 27. The reduction in international enrolment does weigh heavily on our finances, but UPEI's fiscal discipline in previous years has given us a bit of time to sort out the recurring $3 Million shortfall that must be addressed in the coming years. Efforts in the immediate are focused on revenue generation and cost containment. This includes looking at new ways to recruit and retain students, increased fees, process improvements and expenditure reduction. The challenge is to continue to enhance our institutional culture, while recalibrating what is financially safe for the University. Consultations and brainstorming on measures to ensure UPEI's long-term sustainability have begun with the notion that this new financial level setting is a shared responsibility. As Canadian Universities adapt to the new post-international student enrolment crescendo, all are challenged to better communicate their societal value; to reflect to our partners and governments that Universities are where the world solves much of its problems.

As the term comes to an end, convocation is near. This is where we celebrate both the students' achievements and our collective hard work that got them there. This is a good time to remember that everyone at the University contributes to student success in their own way from teaching, to curriculum design, to academic advising, health and wellness services, food services, to those who clear the snow from our parking lots, who manage our pay and benefits; everyone plays a critical role. With the University delivering its ambitious Action Plan and Governance Review, it's important that we remember our duty of care to each other, to be compassionate with ourselves and others.

b. Vice-President Academic and Research Report
Vice President Naterer provides updates on five significant academic and research initiatives that have taken place over the last few months.
- **Research Fund** : This is tri-agency funding that supports the indirect costs of research at UPEI, mostly for salaries of staff members in the Office of Research Services. The allocations from RSF are determined largely based on grant funding through the Tri-Council agencies, NCERT, SHRT, and CIHR. Tri-Council funding has been increasing steadily year after year. And as a result, OR RSF funding has gone up by 12% in the past year, up to $1.17 million per year. This will go towards increasing support for researchers, patent costs, and upgrade of a systems. So special thanks here to all researchers, faculty members, graduate students who contributed to that, and the great team in research services.
- **English Academic Preparation Program:** With changes as to our international recruitment and with more recent changes from IRCC, the need for non-credit programs to improve English proficiency of full time and part time students has diminished to a point where there is no longer a need for them and they are being discontinued. Some courses will continue to be offered to students with intermediate to advanced levels of English proficiency on a part-time basis. For the few students still in the program we have arranged a partnership with Holland College and Study Abroad Canada for any affected students to secure their needed English proficiency.
- **Graduate admissions:** An external review of graduate program admissions has been conducted as per the university's Quality Assurance process and Senate policy with recommendations prepared by the external advisory team. Three overarching themes have emerged: (1) formalization institutional responsibility for graduate admissions, (2) improvement to communication and stakeholder engagement, And (3), establishment of institutional goals and service standards for the admission and onboarding processes for prospective students. In response, we have developed an Action Plan. Faculty members and students can expect some changes and improvements to graduate program admissions in the coming months.

- **Curriculum Coherence:** As this was discussed at Senate a few meetings ago at Senate some an update on our efforts regarding curriculum coherence is provided. Over the coming year, the Teaching and Learning Center (TLC) will reach out to departments and programs that are leading QA reviews, to offer support and assist with data collection aligned with curricular coherence indicators. A curricular coherence initiative will be part of the self-study as part of quality assurance reviews looking to both quantitative and narrative components.
- **Student advising initiative**: With the current challenges in student enrolment, student retention and progression to graduation are going to be very important themes. As you know, Academic advising supports student success by providing personalized guidance on a student's program of study, helping them navigate their coursework and connecting their academic pursuits with future career goals. Work is underway within faculties to better coordinate advising models in the academic units with Dalton Hall.

c. **Vice-President People and Culture Report**
- **Action Plan**: We are progressing in the implementation of the Action Plan with leads across the university finalizing the year-two implementation plans. Those plans are posted online. Over the coming weeks, we will settle the audit plan for years zero and one of the Action Plan.
- **Human resources**: Engagement continues with unit leaders regarding the results of the Employee Engagement Survey. Human resources will start an initiative to determine the training needs of administrative assistants across the University, with a focus on systems, processes and gaps in standard operation procedures. We are in the go-live period for our new leave system. So the implementation for IBEW and QP 501 happens in the first part of May. Other employee groups will be phased into the new leave system over the next few months. Cost of living adjustments have been applied to staff pay effective May 1st, 2025. Faculty cost of living adjustments will be applied effective July 1st, 2025.
- **Equity, Diversity and Inclusion** : In collaboration with BIPOC partners, we are hosting the *Sexual Assault Resistance Education Program* from the University of Windsor for both campus and broader community members. Staff in the department have provided detailed reviews of the draft *Harassment and Discrimination Policy* to support the work of the *Fair Treatment Policy Replacement Committee*. Some may have seen an educational display for Red Dress Day. Red Dress Day acknowledges, and honors murdered and missing Indigenous women and girls.

6. **Question Period**
   a. Questions and answers received from Placemats
   Some questions were received regarding diversification of University revenues, as well as start of studies in January and dates of admission. These are taken away for consideration and Senate will come back to them.
   b. Questions Received in Advance – no questions received in advance.
   c. Questions Received from the Floor
   Q: Will the Graduate Studies Advisory Committee be involved in the review of graduate admissions.
   A: Yes, the Committee has endorsed the report presented to Senate today.
   Q: There is concern that a new policy regarding payment to graduate students has changed the process for payment in a way that may put students at risk. The policy seems to have been developed without consultation or much communication.
   A: We know that payment of graduate students is an ongoing issue for many universities in Canada as there is lack of clarity at the Canada Revenue Agency on what constitutes payment, what is taxable and what is not. There is now some clarity emerging, which may be what has led to the change in policy. We will look at options that will lessen the pressure on students, but we must ensure that we keep to the right side of the law.

7. **Senate Steering and Nominating Committee – W. Rodgers**
President Rodgers noted the vacancies on committees of Senate as outlined in the supporting documentation and called on Senators to look at those and either offer to serve or tap colleague that can.

8. **<u>Revised Course Materials Policy</u>**
Vice President Naderer provides some background to the draft policy. The current policy was enacted in 2002 and was due for review in 2007. It is, therefore, some two decades out of date and a lot has changed over that time. Over the year, students have brought forward concerns regarding the current policy. We have listened to those concerns. In March 2024, we struck a committee with broad representation to review the policy. The Committee includes faculty, librarians, students, staff from the bookstore and a dean. As special thanks goes to members of that committee for their dedicated work. As the Policy has broad implications, input of Senate is welcome. Any feedback received will be taken to the committee for consideration. It should be noted that this is a student focused process as the Policy is largely about students, while understanding that there are considerations for course instructors as well. The purpose of the policy is to ensure that students have fair, reasonable, and appropriate access to course materials and grading materials, that we have clear rules respecting the acquisition of course materials by students, as well as the promotion of openness, transparency, and accountability in the provision of course materials. The Committee has conducted a lot of consultation and received several ideas and concerns, even objections and has taken them all into consideration while churning over several iterations of the Policy. The Policy is tracking towards approval by the Board of Governors later this year.

A comment is brought forth regarding materials produced by professors that can only be rented, with the suggestion that there should be an option to purchase the material.

A quest arises about the communication of the policy and its enforcement, to ensure that instructors respect the Policy and offer students the free options provided under the Policy. The VPAR indicated that the University intend to fully communicate and socialize the policy within the University Community once approved by the Board.

Another question deals with bundled material, where there are no options for students to opt out of the material. The VPAR indicated that the policy encourages instructors to provide alternative forms of grading materials that are not bundled. There may be a need for some measure of exception where that is not possible, particularly in the case of learning software.

An issue regarding the timing of sessional teaching contracts. Some sessional instructors are hired so late that there is no possibility of meeting the deadline for the submission of course materials. The VPAR responded that this is a known issue for which a working group has been struck, with the aim of solving this issue.

The provisions of the Policy that direct students to the bookstore and proscribe reference to third-party sources by instructors may lead to higher prices for students. A quick search online often yields less costly options than those chosen by the bookstore. The VPAR noted the question and indicated that the Policy does not restrict students to the University Bookstore, so they could avail themselves of less costly options on their own. We can consider whether provision 8.5 is necessary.

The strict provisions forbidding the imposition of costs for grading material may be problematic. Some self-directed learning systems offer a complete learning package that includes evaluations. Those systems have shown their value and tend to improve the learning outcomes for students. The provision

that provides for the Dean to authorize exceptions should be made more prominent and flanked with clear criteria framing the Dean's decision.

The limit to the cost of the grading material can also be a problem. It may direct course instructors to lesser products to the students' detriment. The VPAR will take that question back to the committee for consideration.

A concern is raised about the Board's jurisdiction on academic matters. The Policy seems to overlap the authority of the Board and Senate and may cause the Board to overstep into Senate's area of responsibility. The Secretary and the VPAR indicate that the Policy can be tuned as to clearly stay within the Board's authority.

9. **Policy on Academic Units**
Vice President Naterer expresses an often-heard desire on campus to have clarity, consistency and transparency around the governance of matters in academic units. This relates to matters such as the establishment of new units, processes to approve proposals coming to Senate from units, etc. The lack of transparency and uniformity in decision-making can create confusion, duplication of effort, and governance challenges. There is need to ensure transparent and collegial decisions to build trust and a sense of fairness in how decisions are made. The Policy would define criteria and factors to be considered when establishing a new academic unit, guidance on the roles, functions, authority, structure, and collegial decision making within that unit. An example a case where we would all benefit from clarity, are proposals for the creation of new departments as well as merging existing departments. Without a policy, there is no defined process or criteria upon which such decisions are based. We recommend the creation of a committee that would consider these matters and recommend a policy. The terms of this Ad Hoc Committee are provided in the meeting documents.

It was noted that, when a call goes out to populate the Committee, that a clear timeline for the Committee's work to help prospective members understand the related workload.

Motion: (G. Naterer/N. Mannholland) to create an ad hoc committee to develop and recommend a policy on academic units. CARRIED.

10. **Faculty of Medicine** – P. Smtih
Dean Smith provides an update on the launch of the Faculty of Medicine, noting that UPEI is engaged in a rare thing: a program being delivered conjointly by two universities in different provinces. The first students in the joint MD program will be on site in August. Dean Smith notes the addition of Dr. Peter McPherson to the team as Associate Dean. Admissions were opened a month ago, which has garnered much attention in social media and beyond. The administrative team has been building up to a group of about 50. An offer is extended to Senator to visit the new state-of-the-art facility the houses the Faculty of Medicine. The facility provides advanced venues for simulation, a growing component of health-sector education. Those facilities will have an impact well beyond the MD program, with other health professionals having access, namely nursing. The recruitment of teaching professionals is going well, as we are drawing in talent from all over the country. In some cases, we had more interested parties than we could accommodate. The Faculty will distill a report from broad engagement with the University Community to define how all can engage with the Faculty.

11. **Board report to Senate**
Senator Montelpare presents the report of the Board of Governors to Senate. A written report is available in the meeting materials. The Board has approved a new process for the review of the president's performance. The Board also received a presentation from Dr. Marvis Sweeney-Nixon on the

organization of research at UPEI. The Board has appointed a new external auditor and chose Deloitte to audit the Action Plan. A new *Policy on non-disclosure agreements* was approved. Several new policies were enacted to manage the appointment of acting or interim officers of the university. The first tri-committee meeting of the Finance, Audit and Risk, Development, Fundraising and External Relations and Property and Environmental Sustainability committees was held on April 3rd to better coordinate the oversight of capital projects.

12. **Shout Outs**
Shout outs were sent to:
- our departing senators; George Jiang, Noah Manholland, Fatima Sadat, Anna McLaren, Adam McKenzie, Hexi Wang, Roseanne Agumbiade, Paul Bernard, Anne Braithwaite, Nancy Clark, Rachelle Gauthier, Bill Waterman, John McIntyre, and Donald Moses. And noting that Charles Adeyanju will be going on sabbatical leave.
- To the admissions team and the registrar's office who've been incredibly flexible and helpful.
- To the Bachelor of Education cohort who started yesterday.
- To our French Program, which has doubled the number of students; a record number of enrolments.
- To Dean Myers and her able assistant Kathy Hennessy, who have been managing the chaos happening in our building right now as we evacuate the top two floors. They have been great examples of grace under pressure these last couple of weeks.

13. **Motion to Move to a Closed Agenda**

MOTION: (M. A. McMahon/B. Montelpare) that Senate move to a closed session. CARRIED

14. **Adjournment**
MOTION: (B. Montelpare/H. Wang) that the Senate meeting be adjourned.

Senate Report, Vice-President Academic and Research
September 18, 2025

Enrolment Updates

As of September 8th, the total number of students registered (headcount) is 5468, down from last year by about 3% (157 fewer students). The total number of international students registered (international headcount) is 1,595, down from last year by 15% (279 fewer students). As of early September, international students accounted for 29.2% of the total student body for 2025F, lower than that of 2024F (33.3%).

The number of registered new international students (i.e., students who did not have any coursework at UPEI prior to the summer sessions of each year) is 196, down by 43% (148 fewer students) compared to last year. Of the 196 new international students registered, 132 obtained visa approvals. The number of returning/continuing international students is also down, by 8.6% (131 fewer students).

Federal caps on study permits for international students continue to result in fewer international applicants to Canadian post-secondary institutions. Study permit processing times continue to pose ongoing challenges. The Admissions and Recruitment teams have been diligently collecting study permit information to ensure that all registered students are here with the appropriate documentation. Among the ways these teams have been supporting last minute immigration was in providing additional documentation to US applicants hoping to get study permits at land border points. Also, tuition deposits were waived for anyone applying after August 22nd to fast track them to registration, as late applicants have a high likelihood of attending.

The total number of registered domestic students is 3,873, up by 3.3% (122 more students). This increase came from both new intakes (77 more students) and returning/continuing students (45 more students). There are increases of domestic students at both the undergraduate level (97 more students) and graduate level (25 more students). But the domestic increases are not enough to offset the decline in international tuition revenue.

Faculty of Medicine Orientation

The first Faculty of Medicine Orientation was held successfully in late August. It served as an introduction for first-year medical students, providing them with insights into the medical profession, academic resources, available staff and faculty, and fostering a sense of community among peers.

The orientation plan included three members of the Faculty of Medicine Learner Well-Being and Success (LWS) team on PEI, accompanying the PEI learner cohort to St. John's, Newfoundland, where they would participate with their St. John's classmates for a shared orientation experience. The planned schedule featured sessions from various Memorial faculty and staff representatives covering areas such as Medical Laboratories, Anatomical

Gifts, Learner Well-Being and Success, Undergraduate Medical Education, Health and Safety, the Canadian Medical Association, a Financial Fair, and campus tours.

However, on August 14th, an impending Air Canada strike prompted the PEI LWS team to prepare a contingency plan. As the strike began over the weekend, all travel arrangements for PEI learners were cancelled. Alternate arrangements were made quickly to proceed on UPEI's campus with virtual participation in the Memorial University Orientation sessions.

The PEI Orientation took place at UPEI on August 22nd, featuring contributions from both UPEI and Memorial faculty and staff. The day included a tour of Medical Laboratories, a welcoming address from Dr. MacPherson, Associate Dean, PEI Regional Campus and Dr. Power, Associate Dean of Learner Well-Being and Success, a Resource Fair, an IT session, and a panel discussion which included staff, faculty, a new family doctor, and a first-year PEI family medicine resident. The orientation day culminated in a Friends and Family barbecue and facility tour. The week finished with a reception on Friday evening, sponsored by Health PEI, which included tickets to the show "Tell Tale Harbour" at the Confederation Centre of the Arts.

Student Experience Initiatives

Through the Office of Student Culture and Community Standards several initiatives were launched to redesign and improve programs and events on campus. Since March, 2025, changes to the events saw a total of 679 graduating students participate in over 19 events.

This year also brought changes to the planning for the 1st year experience. Our central theme for Welcome Week was to connect the 1st year students to the UPEI Panther identity. The name of this event was changed. Traditionally, the events for 1st year students have been branded as New Student Orientation (NSO). This year we rebranded the event to Welcome Week. Leaning on the concept of all students are Panthers, the Welcome Week branding for all new student giveaways featured the UPEI Panther logo and shirts that new students received were Green with the Panthers logo as well. Also, providing UPEI branded Panther t-shirts in traditional colours provides all students with an item of clothing they can wear to participate in future events such as going to a UPEI sports game or a Panther rally event.

A Welcome Week committee was established to bring together staff from across the campus including Residence, Athletics, Marketing, Communications, Student Services, Mawi'omi Centre, Alumni and Student Union. These partnerships allowed the creation of a dynamic calendar with increased capacity for large events such as a joint Student Services and Clubs and Societies fair that occurred in the Chi Wi Young Sports Centre.

Welcome Week had a total of 37 events held over 10 days.   The Office of Student Culture and Community Standards drafted a student satisfaction survey to go out to all students who participated in the events to gauge their satisfaction with the week. Also there was a survey to staff and faculty to gauge their perspectives to support any changes that might be required to format for next year.

Curriculum Coherence

Over the summer, significant progress in the Teaching and Learning Centre was achieved in the curriculum coherence initiative. Numerical indicators were collected for academic programs across the university. Results include, but are not limited to, program indicators of accuracy and transparency (number of courses in the academic calendar not offered in the past five years); bottlenecks (courses with several prerequisites); long paths (number of instances of four or more courses that must be taken in a specific sequence or order); high enrolment courses (number of high enrolment courses, above 60, in the past year and the past five years); and low enrolment courses (number of low enrolment courses, below 10, in the past year), among others.

These curriculum indicators will be further investigated, in consultation with the academic unit, and with support and assistance from the Teaching and Learning Centre. In the spirit of continual improvement, the academic unit will be invited to consider areas of possible improvement from a student learning perspective, including how the curriculum meets the desired goals and learning outcomes of the program.

Summary of Changes

Faculty of Graduate Studies

#	Type of Motion	Motion
1.	Calendar Entry Change	To change the Graduate Program Admissions, English Language Proficiency Requirements to recognize changes in the English Language Program delivery and the introduction of new tests.

UNIVERSITY of Prince Edward ISLAND

CALENDAR & CURRICULUM CHANGES

Revision is for a: **Calendar Entry Change**

Faculty/School/Department: **Graduate Studies**

Department/Program(s)/Academic Regulations: **Graduate Program Admissions, English Language Proficiency Requirements**

MOTION: To change the Graduate Program Admissions, English Language Proficiency Requirements to recognize changes in the English Language Program delivery and the introduction of new tests.

Reproduction of Current Calendar Entry	Proposed revision with changes underlined and deletions indicated clearly
100 Graduate Program Admissions **English Language Proficiency Requirements** Admission requirements for All Graduate Programs and for Graduate Student Status: The language of instruction at the University of Prince Edward Island is English. All academically admissible applicants, regardless of their country of origin or citizenship status, are required to demonstrate proficiency in the English language prior to undertaking studies at the University of Prince Edward Island. Proficiency is demonstrated by: - possession of a degree or its academic equivalent from an institution recognized by the University of Prince Edward Island and where the language of instruction is English. Proof that the instruction for the degree was in English may be required and will be confirmed by the UPEI Registrar's Office; - or a satisfactory score on one of the following approved English language examinations.	100 Graduate Program Admissions **English Language Proficiency Requirements** Admission requirements for All Graduate Programs and for Graduate Student Status: The language of instruction at the University of Prince Edward Island is English. All academically admissible applicants, regardless of their country of origin or citizenship status, are required to demonstrate proficiency in the English language prior to undertaking studies at the University of Prince Edward Island. Proficiency is demonstrated by: - possession of a degree or its academic equivalent from an institution recognized by the University of Prince Edward Island and where the language of instruction is English. Proof that the instruction for the degree was in English may be required and will be confirmed by the UPEI Registrar's Office; - or a satisfactory score on one of the following approved English language examinations;

CALENDAR & CURRICULUM CHANGES

Motion # 1

Reproduction of Current Calendar Entry

Proposed revision with changes underlined and deletions indicated clearly

Test	Regular Offer (All Programs Except Those Noted in Next Column)	Regular Offer (Nursing Education Doctor of Philosophy, Doctor of Applied Health)	*Conditional Offer
IELTS (Academic)	7 in writing and no band lower than 6.5	7 in writing and speaking; 6.5 in reading and listening	6
TOEFL Paper-based test	600 TWE 6	600 with minimum TWE 6	500 TWE-
TOEFL Internet-based test	100 with a minimum of 25 in speaking and writing; 22 in reading and listening	100 with no band lower than 25	61
CAEL(including CAEL Online)	70	70	50
Pearson/PTE	66	66	50
Cambridge B2 First, C1 Advanced or C2 Proficiency	185 in writing and no skill lower than 176	185 in writing and speaking; 176 in reading and listening	154
GTECCBT	>1250	>1250	1100
CELBAN for Nursing only	--	Listening 7.5, Reading 6.5, Writing 7; Speaking 7	--

Test	Regular Offer (All Programs Except Those Noted in Next Column)	Regular Offer (Nursing Education Doctor of Philosophy, Doctor of Applied Health)	*Conditional Offer
IELTS (Academic)	7 in writing and no band lower than 6.5	7 in writing and speaking; 6.5 in reading and listening	6
TOEFL Paper-based test	600 TWE 6	600 with minimum TWE 6	500 TWE-4
TOEFL Internet-based test	100 with a minimum of 25 in speaking and writing; 22 in reading and listening	100 with no band lower than 25	61
CAEL(including CAEL Online)	70	70	50
Pearson/PTE	66	66	50
Cambridge B2 First, C1 Advanced or C2 Proficiency	185 in writing and no skill lower than 176	185 in writing and speaking; 176 in reading and listening	154
GTECCBT	>1250	>1250	1100
CELBAN for Nursing only	--	Listening 7.5, Reading 6.5, Writing 7; Speaking 7	--
Duolingo	Overall score: 120 Minimum subscores: Literacy: 115 Comprehension: 115 Conversation: 115 Production: 115	Overall score: 120 Minimum subscores: Literacy & Comprehension: 115 Conversation & Production: 120	Overall score: 115 No subscore below 110

Reproduction of Current Calendar Entry	Proposed revision with changes underlined and deletions indicated clearly
	<table><tr><td>Oxford Digital ELLT</td><td>Overall 8 with no individual component below 7</td><td>Overall 8 with 8 in Writing and Speaking, 7 in Reading & Listening</td><td>Overall 6</td></tr></table>
Any exam should have been written within the last two years. If not written in the last two years, students should make arrangements to take the test at least three months before the semester opening date.

*Conditional: Students meeting this requirement must participate in the Graduate English Academic Preparation program and satisfy the minimum Unconditional English Language Proficiency requirements before being permitted to enrol in Graduate level courses or participate in Graduate program activity. | Any exam should have been written within the last two years. If not written in the last two years, students should make arrangements to take the test at least three months before the semester opening date.

*Conditional: ~~Students~~ Applicants meeting this requirement ~~must participate in the Graduate English Academic Preparation program and satisfy the minimum~~ may be offered a conditional admission offer, which requires the prospective student to provide updated English language test results satisfying the minimum Unconditional English Language Proficiency requirements before being permitted to enrol in Graduate level courses or participate in Graduate program activity.

Prospective students with a conditional offer of admission for English language proficiency conditions must submit their updated test results by the following deadlines:

- Admitted to a Summer Semester Start – April 1

- Admitted to a Fall Semester Start – August 1

- Admitted to a Winter Semester Start – December 1 |
| **Graduate English Academic Preparation (GEAP)**
The University of Prince Edward Island may extend a conditional offer of admission to a highly-qualified graduate applicant who does not quite meet the minimum English language proficiency requirement | ~~**Graduate English Academic Preparation (GEAP)**~~

~~The University of Prince Edward Island may extend a conditional offer of admission to a highly-qualified~~ |

Reproduction of Current Calendar Entry	Proposed revision with changes underlined and deletions indicated clearly
set by the graduate program to which the student has applied. A conditional admission allows a student to obtain a study permit (if necessary) and begin their studies in the UPEI Graduate English Academic Preparation (GEAP) program. Upon successful completion of the prescribed terms of study in the Graduate EAP program, the student will proceed directly into the graduate degree program. To be eligible for participation in the Graduate EAP program, an applicant: . - Must be recommended by the appropriate Graduate Admissions Committee. - Can reasonably be expected to reach the required English proficiency standard for unconditional graduate admission in no more than one year (12 months). - May not participate in Graduate level courses or participate in Graduate program activity until the minimum (unconditional) English Proficiency requirement has been satisfied through an acceptable assessment test. The Graduate English Language Preparation program is designed for students coming to graduate studies whose first language is other than English. To be eligible for admission to GEAP, students must have an English proficiency, demonstrated by means of an accepted test, as outlined in the English Proficiency requirements for Graduate studies. The program begins with an in-depth skills and needs analysis to define an individualized education plan focusing on:	~~graduate applicant who does not quite meet the minimum English language proficiency requirement set by the graduate program to which the student has applied.~~ ~~A conditional admission allows a student to obtain a study permit (if necessary) and begin their studies in the UPEI Graduate English Academic Preparation (GEAP) program. Upon successful completion of the prescribed terms of study in the Graduate EAP program, the student will proceed directly into the graduate degree program.~~ ~~To be eligible for participation in the Graduate EAP program, an applicant:~~ ~~Must be recommended by the appropriate Graduate Admissions Committee.~~ ~~Can reasonably be expected to reach the required English proficiency standard for unconditional graduate admission in no more than one year (12 months).~~ ~~May not participate in Graduate level courses or participate in Graduate program activity until the minimum (unconditional) English Proficiency requirement has been satisfied through an acceptable assessment test.~~ ~~The Graduate English Language Preparation program is designed for students coming to graduate studies whose first language is other than English. To be eligible for admission to GEAP, students must have an English proficiency, demonstrated by means of an accepted test, as outlined in the English Proficiency requirements for Graduate studies. The program begins with an in-depth skills and needs analysis to define an individualized education plan focusing on:~~

CALENDAR & CURRICULUM CHANGES

Reproduction of Current Calendar Entry	Proposed revision with changes underlined and deletions indicated clearly
- Advanced Composition: North American convention and academic argumentation to develop clarity, forcefulness, and genre appropriateness - Scientific Writing: quantitative reasoning and analytical writing, if applicable - Writing abstracts, conference proposals, and literature review - Conference presentation requirements and skills - Academic ethics and responsibilities: case study, debate, problem-based learning, data gathering and reporting, seminar presentation - Library familiarization: databases, resources, cultural and program norms - Working with an Academic Mentor and with the Writing Centre - Online Course Work–if required - Computer skills updating–if required **Progress** Students in the GEAP program are expected to satisfy the minimum (unconditional) English Proficiency requirement, through an acceptable assessment test within one year (12 months) of the start of the program. Students who have not met the requirement within the stated time period, may make appeal to the Graduate Admissions Committee for an extension. Appeals will be considered on a case-by-case basis in consultation with appropriate support units.	~~Advanced Composition: North American convention and academic argumentation to develop clarity, forcefulness, and genre appropriateness~~ ~~Scientific Writing: quantitative reasoning and analytical writing, if applicable~~ ~~Writing abstracts, conference proposals, and literature review~~ ~~Conference presentation requirements and skills~~ ~~Academic ethics and responsibilities: case study, debate, problem-based learning, data gathering and reporting, seminar presentation~~ ~~Library familiarization: databases, resources, cultural and program norms~~ ~~Working with an Academic Mentor and with the Writing Centre~~ ~~Online Course Work–if required~~ ~~Computer skills updating–if required~~ ~~Progress~~ ~~Students in the GEAP program are expected to satisfy the minimum (unconditional) English Proficiency requirement, through an acceptable assessment test within one year (12 months) of the start of the program.~~ ~~Students who have not met the requirement within the stated time period, may make appeal to the Graduate Admissions Committee for an extension. Appeals will be considered on a case-by-case basis in consultation with appropriate support units.~~

Rationale for Change: The UPEI English Language Program has changed its delivery model and reduced its offerings. On campus testing has ended. These Calendar entries had to be updated to reflect the program changes and introduce new, more accessible test options.

UNIVERSITY of Prince Edward ISLAND

CALENDAR & CURRICULUM CHANGES

Motion # 1

Effective Term: FALL 2025

Implications for Other Programs: none

Impact on Students Currently Enrolled: none

Authorization	*Date:*
Departmental Approval: Click here to enter name of approver.	Click here to select approval date.
Faculty/School Approval: Click here to enter name of approver.	Click here to select approval date.
Faculty Dean's Approval: Click here to enter name of approver.	Click here to select approval date.
Grad. Studies Dean's Approval: Click here to enter name of approver.	Click here to select approval date.
Registrar's Office Approval: Darcy McCardle	August 26, 2025

Form Version: September 2023

Summary of Motions

Registrar's Office

#	Type of Motion	Motion
2.	Calendar Entry Change	To change the English Language Proficiency Requirements to recognize changes in the English Language Program delivery and the introduction of new tests.

Revision is for a: **Calendar Entry Change**

Faculty/School/Department: **Registrar's Office**

Department/Program(s)/Academic Regulations: Undergraduate English Language Proficiency Requirements

MOTION: To change the English Language Proficiency Requirements to recognize changes in the English Language Program delivery and the introduction of new tests.

Reproduction of Current Calendar Entry	Proposed revision with changes underlined and deletions indicated clearly
50 English Language Proficiency Requirements The language of instruction at the University of Prince Edward Island is English. All academically admissible applicants, regardless of their country of origin or citizenship status, are required to demonstrate proficiency in the English language prior to undertaking studies at the University of Prince Edward Island. Proficiency may be demonstrated by: Undergraduate programs Three years of full-time study in English in Canada or in another country where English is a principal language (as recognized by UPEI); evidence of bilingualism (English and another language) is acceptable for those applicants educated in Canada in a language other than English. Submission of an official test score at or above the acceptable minimum, such as:	50 English Language Proficiency Requirements The language of instruction at the University of Prince Edward Island is English. All academically admissible applicants, regardless of their country of origin or citizenship status, are required to demonstrate proficiency in the English language prior to undertaking studies at the University of Prince Edward Island. Proficiency may be demonstrated by: Undergraduate programs Three years of full-time study in English in Canada or in another country where English is a principal language (as recognized by UPEI); evidence of bilingualism (English and another language) is acceptable for those applicants educated in Canada in a language other than English. Submission of an official test score at or above the acceptable minimum, such as:

Current Calendar Entry table:

Test	Arts, Science, Business, Engineering and Baccalauréate en éducation, Français Langue Seconde)	Nursing, Radiography, Doctor of Veterinary Medicine & Education
IELTS (Academic)	Overall score of 6.5 with no band below 6	Overall score of 7 with 7 in writing and speaking; 6.5 in reading and listening
TOEFL paper-based test	550 with minimum TWE of 5.5	600 with minimum TWE of 6
TOEFL internet-based test	80 with minimum of 20 in each category	100 with a minimum of 25 in speaking and writing, 22 in

Proposed revision table:

Test	Arts, Science, Business, Engineering and Baccalauréate en éducation, Français Langue Seconde)	Nursing, Radiography, Doctor of Veterinary Medicine & Education
IELTS (Academic)	Overall score of 6.5 with no band below 6	Overall score of 7 with 7 in writing and speaking; 6.5 in reading and listening
TOEFL paper-based test	550 with minimum TWE of 5.5	600 with minimum TWE of 6
TOEFL internet-based test	80 with minimum of 20 in each category	100 with a minimum of 25 in speaking and writing, 22 in reading and listening

CALENDAR & CURRICULUM CHANGES   Motion # 2

		reading and listening
TOEFL essentials	8.5 (overall) no score below 8.0	Not accepted
CAEL (including CAEL Online)	60	70
Pearson Test of English	58	66
Cambridge B2 First, C1 Advanced or C2 Proficiency	Overall score of 176 with 176 in writing and no other skill below 169	Overall score of 185 with 185 in writing and speaking; 176 in reading and listening
GTEC CBT	1176-1250	1250 and above
English 621*	70%	N/A

TOEFL essentials	8.5 (overall) no score below 8.0	Not accepted
CAEL (including CAEL Online)	60	70
Pearson Test of English	58	66
Cambridge B2 First, C1 Advanced or C2 Proficiency	Overall score of 176 with 176 in writing and no other skill below 169	Overall score of 185 with 185 in writing and speaking; 176 in reading and listening
GTEC CBT	1176-1250	1250 and above
Duolingo	Overall score: 120 Minimum subscores: Literacy:115, Comprehension: 115, Conversation: 115, Production: 115	Overall score: 120 Minimum subscores: Literacy:115, Comprehension: 115, Conversation: 115, Production: 115
Oxford ELLT	Overall 7 with no individual component below 6	Overall 7 with 8 in Writing and Speaking, 7 in Reading and Listening
English 621*	70%	N/A

Reproduction of Current Calendar Entry	Proposed revision with changes underlined and deletions indicated clearly

Applicants without English proficiency test scores, or with scores below the minimum, may be admitted conditionally (NOT available to applicants seeking admission to Nursing, Radiography, Education or Doctor of Veterinary Medicine), and will be assessed by the EAP Coordinator upon arrival. Depending upon the assessment result, students may be placed in either full-time or part-time EAP. Part-time EAP is taken in combination with up to three credit courses. Upon successful completion of EAP, with an acceptable test score as noted above, these students will be eligible to begin academic studies without conditions related to English language proficiency. *Prince Edward Island high school course English 621 or an analogous grade 12 academic English course from another Canadian Provincial curriculum.	Applicants ~~without English proficiency test scores, or~~ with scores below the minimum, may be admitted conditionally (NOT available to applicants seeking admission to Nursing, Radiography, Education or Doctor of Veterinary Medicine). ~~and will be assessed by the EAP Coordinator upon arrival. Depending upon the assessment result, students may be placed in either full-time or part-time EAP. Part-time EAP is taken in combination with up to three credit courses. Upon successful completion of EAP, with an acceptable test score as noted above, these students will be eligible to begin academic studies without conditions related to English language proficiency.~~ *Prince Edward Island high school course English 621 or an analogous grade 12 academic English course from another Canadian Provincial curriculum.
Undergraduate English Academic Preparation (EAP) The English Academic Preparation (EAP) program is an intensive language program for UPEI students who must upgrade their English language proficiency skills as a requirement of their admission to the University. It is designed to enable students to gain academic skills and confidence in English, and successfully transition to university. Successful completion of EAP is demonstrated through: 1) course work, and 2) the final EAP exam. EAP students must have a passing grade of 70% in all EAP courses and 4.5 or higher in all sections of the final EAP exam in EAP Level 7 to graduate from the program. Students must successfully complete EAP before progressing into second year (see: Academic Regulation 3). **Progress** If a part-time EAP student has not demonstrated improvement of at least one-half a band width, (e.g., from 3.5-4) after two consecutive semesters of study, this unsatisfactory progress will be reported to the Registrar's Office, and credit course status will be reduced. A full-time EAP student who does not show progress after 2 consecutive semesters of study will not be registered in EAP for the following semester, having failed to meet their	~~**Undergraduate English Academic Preparation (EAP)**~~ ~~The English Academic Preparation (EAP) program is an intensive language program for UPEI students who must upgrade their English language proficiency skills as a requirement of their admission to the University. It is designed to enable students to gain academic skills and confidence in English, and successfully transition to university.~~ ~~Successful completion of EAP is demonstrated through: 1) course work, and 2) the final EAP exam. EAP students must have a passing grade of 70% in all EAP courses and 4.5 or higher in all sections of the final EAP exam in EAP Level 7 to graduate from the program. Students must successfully complete EAP before progressing into second year (see: Academic Regulation 3).~~ ~~**Progress**~~ ~~If a part-time EAP student has not demonstrated improvement of at least one-half a band width, (e.g., from 3.5-4) after two consecutive semesters of study, this unsatisfactory progress will be reported to the Registrar's Office, and credit course status will be reduced.~~ ~~A full-time EAP student who does not show progress after 2 consecutive semesters of study will not be registered in EAP for the following semester, having failed to meet their condition of~~

condition of admission.

Definitions
Undergraduate Full-Time EAP: English language program under which a student is not permitted to enrol in any credit courses. Students are engaged in language training only.

Undergraduate Part-Time EAP: English language program under which a student will be enrolled in a combination of EAP and credit courses, as determined by performance in the EAP placement exam (or official English Proficiency test score).

Student Appeals
Students may appeal in writing according to the process outlined in Academic Regulation 12: Other Appeals.

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admission.

Definitions
~~Undergraduate Full-Time EAP: English language program under which a student is not permitted to enrol in any credit courses. Students are engaged in language training only.~~

~~Undergraduate Part-Time EAP~~:
~~English language program under which a student will be enrolled in a combination of EAP and credit courses, as determined by performance in the EAP placement exam (or official English Proficiency test score).~~

To clear this condition applicants can re-test or UPEI will normally offer a part time English language program in which a student will be enrolled in a combination of English Academic Preparation (EAP) and credit courses. For more information about that program please visit Undergraduate EAP | University of Prince Edward Island [link]

~~Student Appeals~~
~~Students may appeal in writing according to the process outlined in Academic Regulation 12: Other Appeals.~~

CALENDAR & CURRICULUM CHANGES

Rationale for Change: The UPEI English Language Program has changed its delivery model and reduced its offerings. On campus testing has ended. These Calendar entries had to be updated to reflect the program changes and introduce new, more accessible test options.

Effective Term: FALL 2025

Implications for Other Programs: none

Impact on Students Currently Enrolled: none

Authorization   *Date:*

Departmental Approval: Click here to enter name of approver.	Click here to select approval date.
Faculty/School Approval: Click here to enter name of approver.	Click here to select approval date.
Faculty Dean's Approval: Click here to enter name of approver.	Click here to select approval date.
Grad. Studies Dean's Approval: Click here to enter name of approver.	Click here to select approval date.
Registrar's Office Approval: Darcy McCardle	August 26, 2025

Form Version: September 2023

Summary of Motions

Faculty of Veterinary Medicine

#	Type of Motion	Motion
3.	Course Title Change	To change the title and course description of VBS 8030

Revision is for a: Course Title Change Faculty/School/Department:

Veterinary Medicine

Department/Program(s)/Academic Regulations: **Department of Biomedical Sciences: MSc, MVSc, PhD**

MOTION: That the change to title and course description of VBS 8030 as outlined below be approved

Reproduction of Current Calendar Entry	Proposed revision with changes underlined and deletions indicated clearly
VBS 8030 PRINCIPLES OF BIOMEDICAL RESEARCH This course provides graduate students in a biomedical field with general knowledge and principles of biomedical research. The lectures and tutorials cover topics like the scientific approach, experimental design, scientific writing, intellectual property, research ethics, preparing seminars, and grant writing. The laboratories focus on laboratory techniques that are useful in biomedical research. LECTURES/TUTORIALS: 1-3 hours LABORATORIES: 3 hours HOURS OF CREDIT: 2 or 3	VBS 8030 PRINCIPLES OF BIOMEDICAL RESEARCH <u>AND PROFESSIONAL SKILLS</u> This course provides graduate students in a biomedical field with general knowledge and principles of biomedical research <u>and associated professional skills for various career paths</u>. The lectures and tutorials cover topics like the scientific approach, experimental design, scientific writing, intellectual property, research ethics, preparing seminars ~~and~~, grant writing <u>and other professional skills</u>. ~~The laboratories focus on laboratory techniques that are useful in biomedical research.~~ LECTURES/TUTORIALS: ~~1~~3 hours ~~LABORATORIES: 3 hours~~ HOURS OF CREDIT: ~~2 or~~ 3

Rationale for Change: This course is being modified to be more applicable to graduate students in a variety of biomedical fields.

Effective Term: WINTER 2026

Implications for Other Programs: None.

Impact on Students Currently Enrolled: None.

Authorization	*Date:*
Departmental Approval: Department of Biomedical Sciences	June 16, 2025
Faculty/School Approval: AVC Graduate Studies & Research Cmt	June 17, 2025
Faculty Dean's Approval: AVC Dean's Council	July 8, 2025
Grad. Studies Dean's Approval: UPEI Faculty of Graduate Studies	July 9, 2025
Registrar's Office Approval: Darcy McCardle	August 26, 2025

Form Version: September 2023

DRAFT Strategic Enrolment Plan
2025 - 2030
Roadmap to Student Success and
Institutional Sustainability
September 2025

Table of Contents

Message from the Vice-President, Academic and Research

This *Strategic Enrolment Plan (2025 – 2030): Roadmap to Student Success and Institutional Sustainability* presents a comprehensive plan to achieve and maintain optimal enrolments, recruitment, retention, and graduation rates. In this context, "optimal" is defined as enrolments that maintain a high quality of education and student success while reaching aspirational goals of academic units and sustainability in terms of available human, financial, and physical resources. The plan presents current and recent enrolment trends at the University and projected enrolment increases in the coming years.

As of the Winter 2025 semester, UPEI's total enrolment was approximately 5,400 students, including 530 graduate students. New faculties - Indigenous Knowledge, Education, Research and Applied Studies (IKERAS) and Medicine – are expected to contribute to future enrolment growth. The Senate recently approved a standalone major (Bachelor of Arts in Indigenous Studies). The first incoming cohort of 20 students into the Faculty of Medicine was recently accepted for the Fall 2025, in partnership with Memorial University of Newfoundland.

The plan presents and analyzes the total university student enrolment excluding the UPEI Cairo campus. Goals and objectives are presented, including for online education. A detailed assessment of recruitment and retention is offered, including the important roles of innovation in academic programs, recruitment processes, community outreach, admission and registration processes, financial aid, scholarships, and retention and graduation rates.

Special thanks to all who contributed in significant ways to the development of this SEM plan and initiatives therein, especially the Steering Committee of this Strategic Enrolment Management (SEM) Plan, chaired by Dr. Melissa James.

The land on which the UPEI community gathers is the traditional and unceded territory of the Mi'kmaq People. We acknowledge the original custodians of this land and give thanks to the Elders – those in the spirit world who came before us and gave us the teachings of life; those here today, who preserve stories and traditions and guide us as knowledge keepers; and those who are Elders in the making.

1. INTRODUCTION

This Strategic Enrolment Management (SEM) Plan is a roadmap for student success and our institution's long-term success and sustainability. The Plan is designed to provide a student-focused approach to delivering academic and non-academic programs by ensuring the university is competitive and resilient when responding to changes in the academic landscape. The development of this SEM Plan included broad consultation with faculty, staff, students, and other stakeholders on campus to provide their diverse perspectives. Most importantly, the Plan is guided by UPEI's mission, vision, and values.
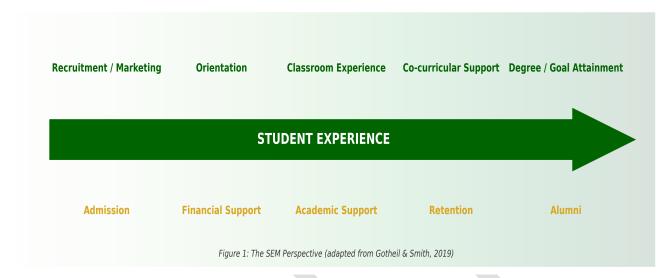
Strategic Enrolment Management (SEM) at UPEI is a coordinated, institution-wide approach to recruitment, admissions, retention, and student success. It is not a single project, but a framework that aligns academic programs, student services, and governance processes around a shared goal: supporting students from their first point of contact with the University through graduation and beyond.

At UPEI, SEM provides:

- A student-centred roadmap that ensures enrolment growth is sustainable and that students have access to the advising, supports, and learning opportunities needed to experience an engaged learning journey, persist, and flourish in society when they graduate.

- Data-informed decision-making by using consistent dashboards, retention metrics, and enrolment projections, where SEM gives us the tools to better utilize evidence-based planning.

- Cross-campus collaboration and coordination across Faculties, Units, the Registrar's Office, Recruitment, Admissions, Institutional Research, ITSS, and Student Affairs. Each unit contributes to a shared accountability framework that keeps student success at the centre of our daily work.

- Sustainability and growth that stabilizes international enrolments, expands graduate programs, improves domestic recruitment, and ensures revenue sustainability to support the University's mission.

Figure 1 below illustrates how SEM works by mapping the student journey and shows how recruitment, admissions, advising, teaching, and co-curricular supports align within a single, coordinated system. This visual reinforces that SEM is about connecting strategy, culture, and student experience.

The UPEI SEM Perspective

Recruitment / Marketing — Orientation — Classroom Experience — Co-curricular Support — Degree / Goal Attainment

STUDENT EXPERIENCE

Admission — Financial Support — Academic Support — Retention — Alumni

Figure 1: The SEM Perspective (adapted from Gotheil & Smith, 2019)

The University of Prince Edward Island (UPEI) has recently developed its next five-year strategic plan, the *UPEI Strategic Plan (2025–2030).* This process to create the plan was launched in September 2024, has involved a five-phase, consultative process, and gathered input and feedback from over 700 participants from the University and wider community. This new strategic plan is intended to serve as the overarching framework for UPEI's future direction.

The strategic plan includes several key components that will guide all institutional endeavors, including enrolment management. The mission, vision, and values are outlined below.

OUR MISSION

The University of Prince Edward Island, founded on the tradition of liberal education, exists to encourage and assist people to acquire the skills, knowledge, and understanding necessary for critical and creative thinking, and thus prepare them to contribute to their own betterment and that of society through the development of their full potential. To accomplish these ends, the University is a community of scholars whose primary tasks are to teach and to learn, to engage in scholarship and research, and to offer service for the benefit of our Island and beyond.

OUR VISION

UPEI aspires to be a leader in transforming lives and communities through lifelong learning. With teaching and research at the heart of our identity, UPEI connects the Island and the world. UPEI enables learners to explore, grow, and discover their interests and their potential. Together, we share the purpose of making our world a better place.

OUR VALUES

Academic Freedom

Seeking and examining evidence and the pursuit of truth are guiding principles for universities. UPEI supports the principles of academic freedom in teaching, research, scholarship, and creativity; publication and collections; and scholarly discourse. The right to academic freedom carries with it the duty to use this freedom in a responsible way.

Accountability and Integrity

We act ethically, and with honesty, transparency, and integrity. We are committed to decision-making that aligns with our values. Individually and collectively, we have a responsibility to each other and the larger community for the impacts of our decisions, actions, and behaviours. Our policies and procedures will encourage respect, empathy, trust, and support.

Pursuit of Excellence

We are committed to continuous improvement of the quality of our policies, processes, and programming, as well as our employee and learner environments. This includes fostering critical thinking, a culture of lifelong learning, and the pursuit of excellence in our teaching, research, and service, and our administration, operations, and technology. It also means innovative recruitment of scholars, employees, and students eager to support the mission of UPEI.

EDI and a Sense of Belonging

We believe in equity, diversity, and inclusivity. We are committed to creating a culture of trust, safety, and inclusion that is characterized by a sense of belonging. We listen, support, and respect each other. The well-being, health, and safety of our community underpin our decision-making. We commit to building community within UPEI and relationships with communities across the Island and beyond.

Reconciliation

UPEI acknowledges the traditions and contributions of Indigenous peoples. We continue to work towards meaningful relations, inclusive education, and actions that support learning, truth, and reconciliation. Through an ongoing journey based on the recognition of rights, respect, and partnership, we are committed to renewed relationships by building an understanding of how the past and present influence the future.

UPEI Strategic Plan (2025–2030)

2. PURPOSE

Key elements of the UPEI Strategic Enrolment Management Plan are to improve the student experience and to achieve and maintain optimal enrolments through effective recruitment and retention activities. In this context, "optimal" is defined as enrolments that uphold a high quality of education and student success while operating sustainably in terms of human, financial, and physical resources.

The plan supports the direction and goals of the UPEI Strategic Plan.

> **"UPEI will be the university of choice for Islanders and a top destination in Atlantic Canada for learners from across Canada and the world. We will achieve this by delivering outstanding learning and experiences in a welcoming environment that values integrated and inspiring teaching, learning, and research. Together, our people, graduates, and research and scholarship will contribute to making our world a better place."**
> (UPEI Strategic Plan, 2025).

As of the Winter 2025 semester, UPEI's total enrolment was 5,400, including 536 graduate students (see Table 1). The SEM process analyzed the composition of enrolments, including international, domestic, and Indigenous students, to arrive at goals to provide quality education and experience for our students.

This plan sets out guidelines to attract students to enroll at UPEI and provide a climate to ensure their success and ultimately graduate from the university. To achieve this aim, the institution must harness its resources, our people, finances, and culture, to provide the best possible experience for our students.

The goals and directions outlined in this document include:

- Establishing baseline metrics and Key Performance Indicators (KPIs), including establishing enrolment targets and retention and graduation targets.

- Ensuring diversity in enrolments.

- Improving the student experience and support.

- Supporting program development and enhancements.

- Recommending improvements in physical and technical infrastructure; and

- Setting a direction to effectively manage faculty and staff resources.

The SEM Plan is a living document and forward-thinking guide that sets the course for our institution over the next five years. While some strategies and tactics are already in motion, others represent ambitious goals that will unfold over time. To ensure a sustainable future, we must act decisively. An overarching theme in this document is the need to adopt data-driven decision-making. This plan lays out a framework of near-term actions, medium-term initiatives, and long-term goals, all designed to enhance the academic and non-academic experiences of UPEI students. This SEM Plan marks the beginning of a new chapter that reimagines how we support and empower our students and how we achieve success as an institution for years to come.

Faculty / Program	2025W
Undergraduate Level	
Arts	1105
Business	900
Science	1812
FSDE	283
Nursing	319
B'Ed and Certificates in Education	102
DVM	275
IKERAS	n/a
Unclassified	84
Total Undergraduate	**4880**
Graduate Level	
MArts	57
Doctor of Psychology	37
MBA	67
MSc -- Science	38
PhD MMS	4
PhD Envn	23
MSC -- SDE	26
PhD in SDE	8
Master of Nursing	16
MEduc	179
PhD Education	13
MSc -- AVC	17
PhD AVC	25
MVSc	9
PostGradDip/Certificate	9
MAHSR	8
Total Graduate Level	**536**
Grand Total	**5416**

Table 1: Winter 2025 enrolments (as of January 20, 2025)

3.   CONTEXT AND TRENDS

Post-secondary education in Canada faces many challenges, and UPEI and PEI are not immune to these environmental conditions. Immigration, Refugees, and Citizenship Canada's (IRCC) changes to international student entry have upended a decade of student enrolment trends. This policy change has also created an environment where competition amongst higher education institutions for domestic students has increased. At the same time, economic conditions are uncertain as the world faces unprecedented tariff wars and global unrest. UPEI must respond to these challenges and develop a stable, long-term approach to enrolment that will ensure sustainability for decades. To build this plan, the Steering Committee and Sub-Committee considered these macro-environmental conditions, internal enrolment trends, and local market conditions.

A key consideration in the SEM planning process is the projected growth in the university-aged population in PEI. Figure 2 (below) charts the projected growth of PEI's university-aged population from 2021 to 2035 (indexed to 100 in 2021). This chart illustrates the importance of UPEI in addressing strategic enrolment management and adjusting our recruitment target markets. The projected growth for PEI suggests a stable pool of university-aged youth, meaning UPEI may not see

significant increases in Islanders. Still, we do not foresee declines that other neighbouring provinces will experience. In this plan, we address demographic changes by focusing our recruitment efforts on maintaining and improving our market share in local high schools and by improving articulation agreements with other institutions. We see opportunities to recruit students from different growing regions across the country and internationally, while balancing investment in areas with declining demographics. Most importantly, we find that we can improve our enrolments over the next five years by focusing our efforts on retention and supporting student success.
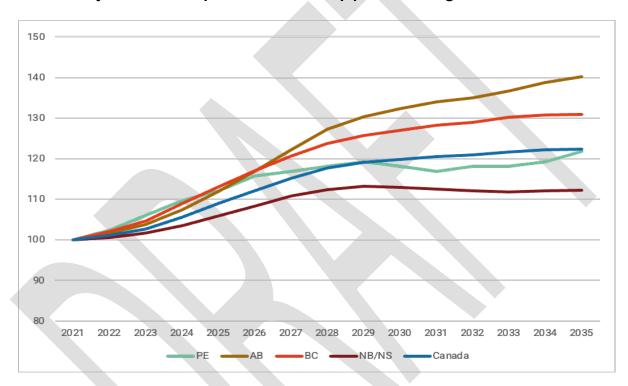
Figure 2: **Projected 18–24-year-old cohort by province/region, 2021-2035**

Source: Higher Education Strategy Associates: Strategic Enrolment at UPEI, 2024

Post-secondary participation rates and other demographic trends are important to understand as they reflect the proportion of individuals enrolled in higher education relative to the eligible population within a specific region. Figure 2 shows that PEI's participation rate has declined over 10 years. PEI's participation rate may have been influenced by the same factors affecting other provinces, such as demographic changes and economic conditions. The participation rate is important to note as it guides our decision-making regarding youth populations and the province's potential pool of university students. Macroeconomic conditions impact participation rates as more (or fewer) potential students seek employment or opt for higher education. Figures 2 and 3 highlight the need for UPEI to strengthen retention initiatives and enhance pathways for traditional and non-traditional students, as economic uncertainty will impact future participation rates.
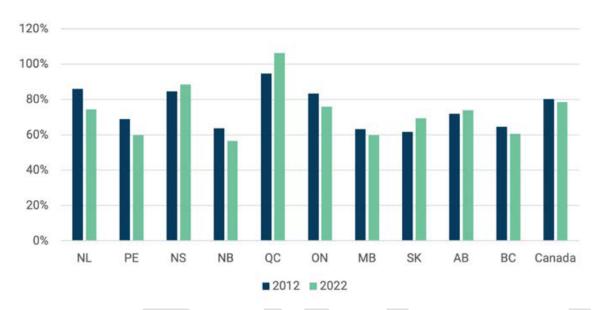
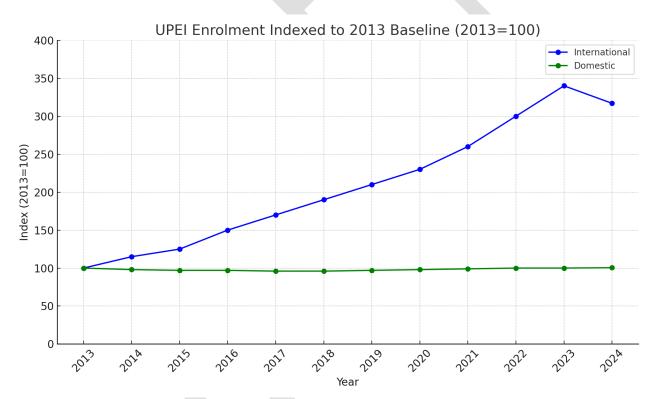Figure 3: **Gross Participation Rates, by Province, 2012 vs 2022**

Prospective students, parents, and agents' perceptions of Canada as a welcoming place for higher education has declined since the IRCC changes (Knott, 2024). For UPEI, the reduced allocation, a dramatically lower number of applications due to Canada's reputational damage abroad, and high visa rejection rates, underscore the need to manage international student admissions strategically, ensuring alignment with study permit approval rates and available resources. Beginning in 2024, the reduced allocation has dramatically lowered the number of applications that UPEI has received. Previously UPEI had experienced significant growth in international students over the past decade (see Figure 4), while domestic enrolment has been relatively flat. Over this decade, international students have contributed socially, culturally, and financially to the institution. However, there is an urgent need to stabilize enrolments and balance resources based on the changes in our projected enrolment patterns. There continues to be an opportunity for stable enrolment growth focusing on student success, retention initiatives, enhanced recruitment, and investment in research and innovation.

Internally, we examined our current enrolment to determine trends and the current state of enrolment. Table 1 shows current (2024/2025) enrolment statistics, with an overall 4% decline compared to the same date a year earlier, primarily due to the impact of the IRCC policy changes on our enrolment. This year's data for 2025 will be updated once the census is finalized. Since our peak intake of international students in 2023, international student enrolments have dropped significantly. Our 2025 incoming class is about 30% of the size of the 2023 cohort, across both

9

undergraduate and graduate levels. These numbers mean that while domestic enrolments remain strong and first-year intake is higher in 2025, they cannot offset the significant financial shortfall created by the loss of international tuition revenue. The long-term impact is particularly concerning: the peak 2023 intake will carry through to graduation in 2027, meaning that the smaller 2024 and subsequent years will affect upper-year enrolments and revenue streams for the foreseeable future, unless we address enrolment management. Without targeted strategies to stabilize and gradually rebuild enrolments, the university faces a structural gap between our resources and enrolments

Figure 4   **UPEI Enrolment – International vs. Domestic students
336% growth in International Student enrolment numbers to 2023**

UPEI Enrolment Indexed to 2013 Baseline (2013=100)

Source: UPEI Institutional Research and Higher Education Strategy Associates: Strategic Enrolment at UPEI, 2024

We also evaluated and benchmarked our retention and graduation rates compared to other regional institutions. Measuring retention and graduation rates is important for understanding student success and institutional effectiveness. Retention rates indicate how well universities support students transitioning from the first year to subsequent years. Graduation rates capture the longer-term outcome of whether students can complete their programs promptly, reflecting both academic quality and institutional support systems.

At UPEI, we must view our retention and graduation rates as core indicators of student success and institutional effectiveness at the _program level_. Table 2 (2019–2021 retention cohorts; 2015 graduation cohort) shows strengths and opportunities by Faculty/School (full program details are not published here). Viewed institutionally, UPEI's first-to-second-year retention is currently 69%, below the MPHEC median of 79%, and our six-year graduation rate is 60%, below the MPHEC median of 71%. These results identify where student supports (advising, clear academic pathways, classroom experiences, early-alert for at-risk students, etc.) can have the greatest impact (See Goal 1). UPEI can close the gap with MPHEC comparators by improving the student experience.

Table 2

Faculty*	First-Year Retention (2019–2021 cohorts)	Six-Year Graduation Rate (2015 cohort to 2021)
Arts	66%	47%
Business (BBA)	76%	64%
Nursing	96%	97%
Science (all programs)	67%	60%
FSDE	78%	66%

Table 2: Retention and Graduation Rates by Faculty – Source UPEI Institutional Research, 2024
*Note: IKEARAS is not included as it is a new program. Education, & AVC are excluded. Retention studies typically focus on programs that high school students can apply to and enroll in (i.e. first-year entry programs).

4.   STUDENT SUCCESS

While creating the SEM Plan, the Steering Committee recognized that two foundational principles are necessary for successfully implementing the Plan: 1) a culture of student success and 2) using data and research to inform decision-making. With rapid growth in student enrolments over the past decade, UPEI has experienced a strain on resources and infrastructure, which has impacted students, staff, and faculty. The Steering Committee and Sub-Committees have designed a forward-looking SEM Plan to address these constraints and prioritize investments.

The two guiding principles of student success and evidence-based decision-making have informed this forward-looking approach to the Plan.

The SEM Steering Committee and Sub-Committees have spent considerable time exploring and consulting on the meaning of student success and what it means for UPEI. The feedback from stakeholders across campus, including faculty, staff, and students, informs the goals of this Plan. However, we note that this work is far from complete. More work is needed to define student success and mobilize and continue building a culture that reflects student success principles beyond measuring graduation and retention rates. One of the Steering Committee's recommendations is to establish separate committees that develop and oversee Student Success at UPEI. We believe UPEI can harness its current commitment and investment in students to be a leader in Canada in student-first education.

Within UPEI's SEM framework, creating a climate that supports the success of underrepresented and Indigenous students is central to achieving enrolment sustainability and equity goals. SEM is not only about the numbers but also about building the conditions where all students can thrive. For Indigenous and underrepresented learners, this means embedding equity, reconciliation, and cultural safety into program design, advising, and student supports. Doing so addresses systemic barriers, strengthens belonging, and ensures that all student groups gain benefits by being a UPEI student. By making this commitment explicit within SEM, UPEI positions itself as an inclusive institution and a leader in student success.

We need additional efforts and measures to strengthen UPEI's commitment to a student-first education and position the university as a national leader in fostering student success. We encourage our campus to integrate student success principles into academic programming, student services, and campus life. This will foster stronger faculty-student engagement, enhance mental health and wellness resources, expand career development opportunities, and create more accessible and personalized student support. UPEI can set itself apart from other institutions by developing a campus-wide, student-first program to support students academically, professionally, and personally.

The SEM committees experienced gaps in some internal information that made establishing benchmarks in this SEM Plan challenging. The institution must invest in data and data collection resources, which will be noted in our recommendations. Research and data must inform enrolment planning as UPEI faces internal and external forces such as demographic shifts, changing student demand and interests, economic uncertainty, labour market dynamics, and policy changes (such as IRCC's study permit caps). Our institution is vulnerable to external disruptions without investing in the necessary market research and data and using it appropriately.

To improve enrolment management, we must also use data analytics, predictive modeling, and market research to make informed decisions about our existing students to improve the student experience. By acting and using these tools, we can:

- Understand program preferences and financial needs to tailor outreach efforts.
- Use student success data to identify at-risk students and implement targeted support programs; and
- Align faculty hiring, facility expansion, and program development with actual enrolment projections to maximize efficiency.

Some data and tracking are simple, such as tracking student usage of our programs and activities. At the same time, other initiatives will be more advanced, such as predictive modelling or tracking satisfaction measures, and will take resources and time to implement. All are important so we can improve and support our students. By integrating this evidence into our decision-making at every level, we can develop an adaptable, student-centered enrolment strategy that ensures long-term sustainability and growth.

5.   STRATEGIC DIRECTIONS

This section outlines the goals, strategies, and tactics for achieving our institution's vision for sustainability and student success. As stated previously, this plan is drafted with the understanding that research and data will inform each decision in implementing the SEM Plan. Each section begins by defining overarching goals that align with our mission, such as optimizing enrolment, enhancing diversity, and improving retention rates. The report then delves into specific strategies to meet these objectives, including targeted recruitment efforts, enhanced student support systems, and data-driven decision-making. Finally, it breaks down actionable tactics that translate these strategies into measurable outcomes, providing a clear roadmap for implementation. These components form a cohesive plan to ensure the institution's long-term success.

To arrive at each of the stated goals, the Committee reviewed:

1) existing enrolment projections from each faculty (Appendix 4).
2) submissions from each faculty/unit on campus regarding student retention.
3) internal data, including but not limited to, retention, enrolment trends, student demographics, and student use of support services.
4) external research, including, but not limited to, IRCC reports, National Survey of Student Engagement, McLean's rankings, Maritime Provinces Higher Education Commission reports, and other publicly available reports; and

5) Research from the Higher Education Strategy Associates' review of UPEI enrolment and the competitive environment.

The four main goals are outlined below.

5.1 Student Success

<div style="border:1px solid">

GOAL 1

Elevate Student Persistence and Completion

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- **First-to-second-year retention: UPEI aims to reach or surpass the MPHEC median of 79% — UPEI is currently at 69%.**
- **Six-year graduation rate: UPEI aims to reach or surpass the MPHEC median of 71% — UPEI is currently at 60%.**
- **Build an Indigenous student access and success framework in partnership with Indigenous communities and create shared measures of student success.**

To achieve these outcomes, we must provide every academic program with the resources and support needed to meet or exceed these benchmarks. We will support each program in meeting these targets by implementing policies focusing on student success and recognizing that admissions, advising, and assessments will not solely improve student persistence. Retaining students requires campus-wide engagement in SEM, communication, and accountability. To monitor our progress, we will publish an annual KPI dashboard to inform adjustments to the tactics outlined below.

Strategy 1
Enhance Student Preparedness and Admission Standards

Objective: Admit academically and holistically prepared students so they thrive from day one.

#	Tactic
1	Re-evaluate posted program-specific minimum entrance requirements (minimum GPA and prerequisites) and ensure alignment with peer benchmarks and labour-market needs.

#	
2	Ensure regular (at least twice per year) strategy meetings between the appropriate academic program leads (e.g., Chairs, Coordinators, Deans) and the Admissions Department, where KPIs are established and formalized for the minimum average to be considered for admission according to the pool of applicants and seat capacity, proportion of equity-denied seats, and international seats.
3	Program leads and the Admissions department will explore whether a holistic assessment process would be feasible and optimal for some applicants with focus to ensure equitable access for Indigenous students.
4	Use retention data to determine which Gateway and Summer Preparatory programs drive first-year persistence.
5	Target recruitment of high achievers through scholarships, high school counsellor toolkits, and data-driven outreach.

Strategy 2
Build a Supportive First-year Experience

Objective: Cultivate belonging, engagement, and academic confidence through structured cohorts and clear university norms.

#	Tactic
1	Develop a "Campus Playbook" module embedded in Moodle and other platforms that helps students navigate university life.
2	Implement an extended Welcome Week and missed orientation session linking students to their cohort and mentors all semester. Customize these programs, when necessary, to meet the needs of first-generation and Indigenous students.
3	Ensure that all first-year students have a faculty advisor and/or student Academic Mentors.
4	Coordinate assessment calendar for first-year students to avoid exam clustering and overload.
5	Support/invest in additional first year advising and people.
6	Implement UPEI's curricular coherence policy at the program level to ensure program pathways are clear, logical, and easy for students to understand. This will help students see how their courses connect, reduce confusion about requirements, and support stronger retention and completion.

Strategy 3
Leverage Data Informed Advising and Early Intervention

Objective: Use timely data and proactive support to address emerging student challenges before they derail student progress.

#	Tactic
1	Develop a university-wide retention definition and dashboard distinguishing program-level from institution-level retention.
2	Define the term "advising" on campus. Formalize academic advising and coordinate advising across campus. Strengthen academic advising and career development supports for students.
3	Establish an early alert or early assist system, at the program level, triggered at GPA < 2.0, missed logins, or attendance flags with timely notification to relevant student advising teams.
4	Build one advising system with trained staff who will use clear steps to help students but adjust them as needed for each faculty. Publish a simple guide explaining the help students can get from each advising office.
5	Create a Student Experience Advisory Council (one for undergraduate and one for Graduate), providing continuous feedback on committee initiatives.
6	Institute annual retention/satisfaction, exit surveys, and program loss analysis to identify issues and inform interventions. Customize these as needed for units and faculties.

5.2 Enrolment

GOAL 2

Stabilize then grow enrolment

To ensure a sustainable future, UPEI must stabilize and rebalance its enrolment profile by strengthening student recruitment and retention, enhancing the overall student experience, and achieving a balanced mix of domestic, international, undergraduate, and graduate students. This goal outlines the roadmap to ensure the University can scale responsibly toward a target of approximately 6,000 students by 2030. Central to this goal is ensuring international enrolment levels are no more than 25% of the total student body while expanding access for underrepresented communities and building flexible delivery models. We must diversify our international markets, so we are not overly dependent on any one market and risk being exposed to geo-political factors. By stabilizing before growing, UPEI can manage quality and grow in a way that aligns with capacity and sustainability. Achieving this goal requires a whole-campus effort: faculty, staff, students, and

alumni all play a role as ambassadors and recruiters, shaping the student experience and extending UPEI's reach.

- **Stabilize and rebalance enrolment mix (focusing on Indigenous and underrepresented groups, retention, and student experience) in the short term, then scale responsibly to approximately 6,000 students by 2030. (See Table 1)**
- **Balance international student enrolment at 22-25% of total enrolments.**

Strategy 1
Strengthen Recruitment

Objective: Expand enrolment through diversifying markets and enhancing the use of digital technologies to help us improve recruitment.

| #	Tactic
1	Build specific market plans for domestic and international students (graduate and undergraduate), using market data to define prospective student markets and develop tailored recruitment plans/messaging. Establish 2–3-year targets and KPIs for each market. In identifying these markets, seek prospective students and families who value the unique advantages of UPEI's location, such as the Island's lifestyle, rural setting, close-knit community, and supportive learning environment.
2	Build a stronger student prospect funnel for graduate and undergraduate (See Figure 5 below) by raising UPEI's profile and brand by hosting an institution-wide Open House (in-person and virtually) every year, implementing virtual campus tours, improving partnerships with PEI schools, expanding articulation agreements, investing in and improving our digital presence on our website and in social media, and developing a welcome kit for new students.
3	Develop capacity to support and recruit students from underrepresented and Indigenous communities. Work with internal and external stakeholders to create and inform these plans.

UPEI Recruitment Funnel
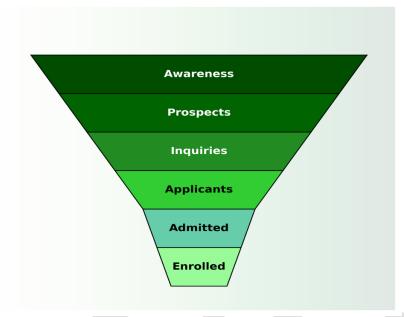
Figure 5

Strategy 2
Diversify Delivery Models

Objective: Align enrolment growth with flexible learning.

#	Tactic
1	Conduct market analysis (domestically and internationally) to identify program trends and design micro-credentials and certificate pathways.
2	Leverage online delivery to reach new markets (internationally when possible and domestically) and create flexible options for students, reducing pressure on space/campus capacity.
3	Develop online and hybrid courses and programs using UPEI's Institutional Framework for Online and Technology-Supported Learning and MPHEC guidelines to ensure quality and credibility.
4	Ensure course delivery consistency (avoid last-minute shifts in modality). These changes can undermine students' trust in the institution, create unnecessary stress, and weaken their sense of belonging.

Strategy 3
Align Programs with Capacity and Sustainability

Objective: Ensure growth matches institutional capacity, promotes program and research innovation, and fosters long-term sustainability.

#	Tactic
1	Develop a model that evaluates the ability of our high-demand programs to properly expand and determine how to allocate resources properly to support their growth.
2	Identify and evaluate under-subscribed programs/courses and recommend steps to repackage with other interdisciplinary programs/courses, rebrand, or remove.
3	Increase summer academic offerings to accelerate time-to-completion and promote part-time funding opportunities for students. Consider how summer programming can prepare first entry students for the transition to university.
4	Innovate our programs to align with our research priorities and interdisciplinary collaboration.
5	Expand the student opportunities for experiential learning and international experiences.

5.3 Graduate Enrolment

GOAL 3

Strengthen Graduate Capacity and Excellence

Graduate education is important to UPEI's academic reputation, research impact, and long-term sustainability. Expanding graduate program enrolment will diversify the student body and increase the institution's contribution to innovation, research, and community engagement. To achieve this, UPEI must create flexible, high-quality programs aligned with its research strengths, increase support that ensures timely student completion, and expand faculty and institutional capacity to deliver graduate programs. This investment will strengthen UPEI's brand and appeal to potential undergraduate and graduate students.

- **Increase Graduate Enrolment to 15% of total enrolment by 2030**

Strategy 1
Strengthen Graduate Studies Capacity

Objective: Position graduate expansion as a critically important element in the building of UPEI's reputation and funding.

#	Tactic
1	Track internal and external data to improve under or over-subscribed graduate program enrolment; ensure existing graduate programs evolve in innovative and relevant ways; and support the development and delivery of new programming to meet the needs of future graduate/PhD students.
2	Expand graduate student funding and fellowship opportunities to attract and retain top candidates.
3	Broaden faculty participation in graduate supervision to increase capacity and mentorship opportunities. Develop a framework to support graduate supervisors in recruiting and contributing to graduate student success.
4	Create new innovative opportunities within graduate programming (thesis-based; course-based; shorter specialized certificate programs, micro-credentials) and delivery frameworks.

Strategy 2
Expand Graduate Programs and Pathways

Objective: Create flexible and innovative graduate opportunities that align with labour market demands and UPEI's Strategic Plan, 2025 - Pillar 2: "Innovative and Connected Teaching, Research, and Scholarship."

#	Tactic
1	Develop new course-based master's and certificate programs based on UPEI's research focus (e.g., Sustainability and One Health) and where there is an opportunity to innovate across disciplines, support innovation and entrepreneurship, and link to current and future labour market needs and demands.
2	Create and promote pathways into graduate degrees for existing undergraduate students. The "Student as a Scholar" program can help build undergraduate research and develop future graduate students.
3	Create part-time and self-funded pathways for working professionals who seek to "up-credential".

Strategy 3
Enhance Graduate Student Support and Retention

Objective: Address time-to-completion challenges and improve the graduate student experience.

#	Tactic
1	Restructure and expand the Faculty of Graduate Studies to streamline policies and services.
2	Create TA positions and PhD student fellowships within UPEI to provide development and paid work opportunities for UPEI graduate students.
3	Develop clear benchmarks for time-to-completion and implement checks to support students' completion before the end of their funding.
4	Strengthen academic advising and career development tailored to graduate students. Create opportunities for self-funded graduate students.

5.4 Data Governance

GOAL 4

Build SEM Data and Governance Accountability

Enrolment management requires transparency, delegated, and shared data governance. Data governance for SEM at UPEI is defined as the coordinated framework of policies, standards, roles, and processes that ensures enrolment-related data is accurate, consistent, and accessible across the student lifecycle, from recruitment to graduation. It establishes a single source for key SEM metrics such as applications, yield, retention, graduation, and enrolment by faculty, program, and student group. By clarifying data ownership (who is accountable), stewardship (who maintains quality), and access (who can use it for decision-making), data governance reduces duplication and conflicting reports between units, strengthens compliance with privacy and MPHEC requirements, and builds confidence in the evidence used for Senate, Board, and government reporting. Effective SEM data governance ensures that recruitment strategies, retention initiatives, and program planning are all guided by trusted, timely, and well-defined data.

We have strong data analytics expertise in our institution that provides institutional-wide data and external reporting. UPEI faces significant data gaps that limit its ability to make timely, day-to-day operational and strategic decisions. Addressing these gaps requires building integrated systems, shared accountability, and institutional capacity for data analysis. By strengthening data governance, UPEI can monitor enrolment performance, anticipate challenges, and allocate resources more effectively to support student success and institutional sustainability.

- **By the Spring 2026, we will establish and adopt a formal SEM data governance framework, with Admissions, Registrar, Recruitment, Student Affairs, Scholarships, Awards and Financial Aid, Marketing, and all Faculties using similar definitions, protocols, and access rules.**
- **By the Fall of 2027, we will establish a fully integrated data warehouse and dashboard of SEM KPIs (applications, offers, conversions, enrolments, retention, satisfaction).**
- **By the Fall 2027 and annually thereafter, we will produce and present a SEM Data Report to the Senate and the Board of Governors, including performance against KPIs, recruitment metrics, and evidence-based recommendations for enrolment and student success interventions.**

Strategy 1
Establish Transparent Data Governance Structures Supported by Digital Transformation

Objective: Create an institutional framework that defines roles, responsibilities, and shared accountability for SEM data.

#	Tactic
1	Formalize a data governance framework outlining data stewardship roles, responsibilities, and delegated authority across Recruitment, Admissions, Registrar, Faculties, and Institutional Research.
2	Establish clear access protocols to ensure transparent data sharing across units while safeguarding integrity and compliance.
3	Embed data governance oversight into the SEM governance structure to align reporting and accountability.

Strategy 2

Build an Integrated SEM Data Infrastructure

Objective: Implement digital tools and systems that provide centralized and shared retention and student success data.

#	Tactic
1	Conduct a systems inventory map (marketing, ecruitment, admissions, registrar, and CRM) and integrate this into a data warehouse.
2	Develop a SEM data warehouse and dashboard, prioritizing recruitment funnel analytics, conversion rates, and retention indicators. Ensure the warehouse and systems are regularly updated and maintained.
3	Link SEM KPIs (applications, offers, enrolments, retention, satisfaction, student feedback) to a dashboard and create real-time monitoring that is accessible to all who require access.

Strategy 3
Strengthen Data Capacity and Culture

Objective: Build analytical and reporting capacity to support evidence-based decision making.

#	Tactic
1	Increase staffing and training for data analysis and intelligence dedicated to SEM and ensure resources are available and engaged at the program level.
2	Create a campus-wide reporting cycle, sharing progress on KPIs and highlighting improvement opportunities. Produce an annual SEM data report for senior leadership, Senate, and the Board of Governors, aligned to institutional goals.
3	Develop predictive modelling tools to forecast enrolment trends, student progression, and risk indicators.

6. IMPLEMENTATION PLAN

The development and implementation of this SEM plan are presented in two phases: 1) overall institutional goals, strategies, and tactics; and 2) detailed implementation, including specific activities. The four overarching goals and associated strategies and tactics have been outlined in the previous sections of this document. At the same time, an implementation plan is being created by the Prioritization and Implementation Sub-Committee. The document created by the Prioritization and Implementation Committee will be forthcoming later this year. This implementation plan is an evolving set of activities that will be continually updated to reflect emerging trends and external factors. Throughout this process, there is a recognition from stakeholders that we must be flexible and nimble.

The Prioritization and Implementation Subcommittee is examining and making recommendations regarding the physical infrastructure, space, and IT resource implications to prioritize goals and tactics. This effort includes prioritizing student support and services; retention activities; financial aid; scholarships; and co-curricular, experiential learning and co-operative education opportunities. The implementation plan will also address how recruitment goals must be aligned with marketing and communications support. For each tactic, the Prioritization and Implementation Committee will answer the five questions below:

1. Who is the person(s) best positioned and responsible to lead and enact this tactic?

2. What is the level of priority (acute, somewhat urgent, nice to have) for this tactic?

3. When should the tactic be enacted (year 1, 2, 3)?

4. What steps do you recommend for enacting the tactic?

5. What type(s) of resources are needed?

7. SUMMARY

This UPEI Strategic Enrolment Plan provides several key recommendations and strategic directions for the university's future.

1. **Respond Urgently to Federal Policy Changes:** This plan recommends that UPEI implement urgent responses to the new external constraints introduced by IRCC changes to international study permits in 2024. These responses include committing to adjust tactics as conditions evolve, particularly in response to federal policy changes.

2. **Focus on the Full Student Lifecycle and Composition:** UPEI should set its direction for undergraduate and graduate success across the entire student lifecycle, from recruitment to graduation. This SEM plan specifically recommends examining the total headcount and the intended composition of the student body, including domestic, international, and Indigenous learners. It also suggests assessing the drivers of recruitment and persistence.

3. **Enhance Student Support for Timely Graduation:** To improve student support and help them graduate on time, the plan recommends coordinating efforts around several key factors:

   - Innovative and clear academic programming.
   - Community (all of campus and stakeholder) engaged recruitment.
   - Streamlined admissions and registration processes; and
   - Coordinated advising.

4. **Implement and Monitor with Transparency:** For effective implementation, the SEM plan recommends that all efforts must be focused on clear targets, milestones, and evidence-based decisions. It also calls for establishing baseline measures, monitoring progress through shared dashboards, and publishing KPIs to ensure transparency.

5. **Foster Collaboration and Adaptability:** This plan recommends working collaboratively with faculty, staff, students, and Indigenous and community partners. Enrolment and student success are not the responsibility of a single office. By involving faculty, staff, students, and community partners, the plan creates shared accountability. This broad ownership increases the likelihood that initiatives will be implemented effectively.

A crucial recommendation is to adjust tactics so we can be flexible and nimble as conditions evolve especially in response to external factors like federal policy changes, to ensure UPEI remains on a sustainable trajectory prioritizing access, belonging, and student success.

7. ACKNOWLEDGEMENTS

The contributions of faculty and staff members, students, Strategic Enrolment Management (SEM) Steering Committee, and its Subcommittees, and others, through written input, participation at meetings, or otherwise, are gratefully acknowledged. Special thanks to Dr. Melissa James (Chair, SEM Steering Committee), Dr. Miles Turnbull (Chair, Prioritization and Implementation Subcommittee), Jonathan Hewitt (Chair, Student Experience Subcommittee), and Deans Council for their leadership in the development of this SEM plan.

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APPENDIX 1:
TERMS OF REFERENCE AND MEMBERSHIP OF COMMITTEES

Steering Committee for UPEI's Strategic Enrolment Plan Terms of Reference

Purpose

The Steering Committee provides guidance and oversight of the development of UPEI's Strategic Enrolment Plan. It develops the framework for the overall enrolment plan and establishes specific questions for subcommittees. The Steering Committee will prepare a report with recommendations to the President including future enrolment projections for the University by Faculty / School; recruitment and retention initiatives; strategies to enhance student success; and online learning strategy.

Duties and Responsibilities

- *Provide direction for the consultation and planning process.*
- *Coordinate activities and liaison among the subcommittees.*
- *Collect and analyze data involving University enrolment trends.*
  - *Develop enrolment recommendations and projections including international, Cairo campus, Indigenous and other enrolment objectives related to a diverse and inclusive student body.*
    - *Support the development of programmatic enrolment goals in consultation with Faculties / Schools.*
- *Present regular updates and consult with the University senior leadership team.*
- *Liaison with the Working Group for an Institutional Framework for Online Learning.*

Membership
The membership consists of the Chair, Director of Strategic Planning; Chair, Student Experience Subcommittee; Chair, Prioritization and Implementation Subcommittee; University Librarian; Undergraduate and graduate student representatives; member of the Faculty, Associate Vice-President (Students) and Registrar; Associate Vice-President (Research) and Dean of Graduate Studies, and University Librarian.

Communication
Feedback collected from subcommittees will be assembled and used to create a draft enrolment plan for review by a range of stakeholders – subcommittees; Deans Council; academic units (via Deans and their Faculty Councils); Library Council; Student Union; and senior executive team. The Strategic Enrolment Plan will then be submitted for review and approval by the Academic Planning and Curriculum Committee (APCC); Senate and Board of Governors.

Prioritization and Implementation Sub-Committee

Purpose

The Prioritization and Implementation Subcommittee has two main mandates:

1) Identifying short-term actions (low-hanging fruit) that are required immediately as a foundation for implementing a SEM Plan in the mid-to-long term. Costing for the implementation of these actions will be estimated, and all actions will be prioritized over the 2025-26 and 2026-27 fiscal years. The individual(s) responsible and the proposed timeline for completion will be proposed. This will also involve documenting actions that have already begun in 2024-25 and assessing the degree to which these actions are complete as well as any additional resource needs to bring actions to fruition.

2) Examining the physical infrastructure, space, human and IT resource implications associated with the overall goals, strategies and tactics proposed in the draft enrolment plan. This assessment will include but will not be limited to:

• Identifying space and physical infrastructure constraints with continued enrolment growth.
• Identifying new labs and classrooms that may be required to achieve enrolment goals.
• Considering human resources needed for academic program delivery and recruitment and retention initiatives.
• Recommending opportunities for more efficient use of available resources such as classroom utilization, work from home, and re-assignment of under-utilized spaces.
• Considering room usage data for the development of more efficient space utilization.
• Recommending how new learning spaces and revitalization of existing learning spaces on campus can facilitate and support the enrolment plan.
• Assisting the University in planning for capital investments for equipment, building and technical infrastructure.

Membership
The membership of the Prioritization and Implementation Subcommittee consists of: Associate CIO, TLC Coordinator, Associate Vice-President (Facilities Management and Construction); Graduate Programs Officer, Comptroller or designate; Scheduling Coordinator from the Registrar's Office; Recruitment Manager, Admissions Manager, Marketing Director, and three Faculty members, Dean representative from Dean's Council (Nola Etkin), representative from the APCC Steering Committee (Chair).

Student Experience Subcommittee for Strategic Enrolment Plan Terms of Reference

Purpose

The Student Experience Committee is responsible for a comprehensive review and the progression of all elements essential to fostering an exceptional environment that promotes academic excellence, student development and career readiness. This encompasses student support services, strategies for improving student retention and reducing attrition, financial aid and scholarship programs, as well as co-curricular, experiential, and co-operative education opportunities. The University's strategic enrolment planning, recruitment and retention initiatives depend on communication and decision making, informed by a collective understanding of student success and the student experience at UPEI.   The Committee is entrusted with exploring and promoting the implementation of innovative approaches to academic programming, enhancing sense of community and engagement, and improving admissions and retention through collaboration with campus partners to advance the University's Strategic enrolment goals.

Duties and Responsibilities

- Develop the UPEI definition of Student Success.
- Identify student support and services to ensure an exceptional student experience in the context of future enrolment goals.
- Gather and utilize key data to understand and promote Student Success to enhance the student experience.
- Develop recruitment and retention plans that align with the enrolment objectives.
- Consider strategies to enhance the reputation and innovation of academic programs.
- Consider strategies to enhance the co-curricular activities.
- Examine admission and registration processes with changing enrolments.
- Identify financial aid and scholarships associated with enrolment goals.
- Connect the enrolment objectives with planning of communications.
- Embrace diversity and inclusiveness in the enrolment including strategies to achieve diversity in terms of Indigenous and under-represented groups.

Membership
The Student Experience Subcommittee consists of a Dean; Members of Faculty, Manager of Residence, Manager of Academic Support Services, Manager of Student Culture and Community Standards (Chair), Manager of Experiential Education

APPENDIX 2: TIMELINE

Activity	Completion	Deliverable
Steering Committee established	Jan. 2024	
Higher Education Associates engaged	April 2024	Conduct a situation analysis of the internal and external environment.
Enrolment input from Faculty and Schools	July – Oct 2024	Each faculty/unit provided input on student experience, enrolments, and improving retention
Higher Education Associates presentation and findings	Oct. 2024	Presentation on high-level opportunities and threats
Steering Committee Meetings and Workshops	Nov. 2024 – Jan. 2025	Steering Committee meetings and workshops to establish high-level goals
Steering committee priorities are established	End of Jan. 2025	4 – 6 key goals to direct the work of the sub-committees
Student Experience Sub-Committee begins work	April 2025	Committee seeks input on priorities and defining student success with campus stakeholders
Priorities and Implementation Committee begins work	April 2025	Committee identifies immediate actions for enrolment management and prioritizes initiatives.
Dean's Council Update	April 2025	Steering and sub-committees deliver update to Senate
Presentation and consultation with campus	May 2025	Steering Committee presents draft goals to campus
Sub-committee objectives and key actions are identified	June 2025	Sub-committees submit to Steering Committees
Steering committee incorporates feedback from sub-committees & Campus community	June - August 2025	Steering Committee finalizes draft SEM Plan
Draft SEM Plan completed	Sept-Oct 2025	Document for Senate and Board consultation
Committees review feedback	October 2025	Finalize SEM Plan

APPENDIX 3: HISTORY AND CONSULTATION

Consultation and Planning and Development of a Strategic Enrolment Plan Office of the Vice-President, Academic and Research

1. *Deans Council retreat and meetings on Strategic Enrolment Management (2023 and 2024)*

   • *Deans and University Librarian presented an overview of historical and projected future enrolments in their unit*

• *Presented materials were compiled into draft documents for each Faculty / program*

   • *Deans and University Librarian review draft document, hold collegial consultation within their unit, then provide feedback on the document by late Fall*

2. *Creation of an institutional Steering Committee and subcommittees*

   a) *Steering Committee: Director of Strategic Planning; Chair, Student Experience Subcommittee; Chair, Prioritization and Implementation Subcommittee; University Librarian; Undergraduate and graduate student representatives; Associate Vice-President (Students) and Registrar; Associate Vice-President (Research) and Dean of Graduate Studies; and VPAR (Chair).*

   b) *Student Experience Subcommittee: Dean; Librarian; undergraduate and graduate student representatives; Director of Recruitment; Director of Student Affairs; Director of Experiential Learning; Director of Marketing and Production; Manager of Institutional Research; and Faculty Member (Chair).*

   c) *Prioritization and Implementation Subcommittee: Associate CIO; TLC Coordinator; Associate Vice- President (Facilities Management and Construction); Comptroller; Scheduling Coordinator; and Dean representative from the APCC Steering Committee (Chair).*

     3. *Steering Committee develops framework for the overall enrolment plan and establishes specific questions for subcommittees*

        4. *Feedback collected from subcommittees and draft document*

created by Steering Committee

5. *Consultations on draft document – subcommittees, Deans Council, academic units (via Deans and their Faculty Councils), Library Council, Student Union, senior executive team*

6. *Submission to APCC followed by Senate and Board*

APPENDIX 4: ENROLMENT PROJECTIONS BY FACULTY *

Enrollment Projections by Faculty (# students / headcounts in program as of December 1 each year)

Including both full-time and part-time students.
AY = Academic Year (from September to following August)

Faculty	2025 *	2026	2027	2028	2029	2030	5-year Growth
Arts [1]							
* Undergraduate (BA, BIS, BM)	1,121	1,070	1,065	1,085	1,105	1,121	
* Graduate (MA, PsyD)	102	104	108	116	120	124	
Business [2]							
* Undergraduate (BBA, BIS)	895	860	855	870	880	895	
* Graduate (MBA, EMBA)	71	74	77	80	82	86	
Education							
* Undergraduate (BEd) [3]	106	116	120	121	122	124	
* Graduate (MEd, PhD)	257	258	260	262	264	266	
Graduate Studies							
* Graduate (Cleantech)	15	25	35	40	45	50	
IKERAS							
* Undergraduate (BAIS)		20	36	50	62	72	
* Graduate (MAIS)			2	4	6	8	
Medicine							
* MD Joint Program [4]				20	40	60	
Nursing [5]							
* Undergraduate (BScN)	325	345	355	362	365	365	
* Graduate (MN)	12	18	22	24	27	30	
Science [6]							
* Undergraduate (BSc, BES, BIS)	1,746	1,640	1,660	1,740	1,800	1,850	
* Graduate (MSc, MAHSR, PhD)	53	58	62	68	70	75	
Sustainable Design Engineering							
* Undergraduate (BSc) [7]	274	280	320	380	440	490	
* Graduate (MSc, PhD)	37	42	47	53	57	63	
Veterinary Medicine							
* Undergraduate (DVM, 69 to 96) [8]	276	296	316	336	366	384	
* Graduate (MSc, MVSc, PhD, Dipl)	64	67	70	74	78	81	
Total (Undergraduate Students)	4,879	4,627	4,727	4,944	5,140	5,301	
Total (Graduate Students)	609	646	683	741	789	843	
Unclassified / Non-program	120	120	120	120	120	120	
GRAND TOTAL	5,609	5,393	5,530	5,805	6,049	6,264	

Assumptions:

* Reported on December 1, 2024; projected year over year reduction of 1.9% from June 2, 2025 enrolment report

1: Undergraduate enrolment recovers within 5 years; expansion of graduate program offering

2: Undergraduate and Graduate enrolments recover within 5 years

3: Projected increase of incoming cohort size from 30 to 35 (a 17% increase)

4: Startup date of MD joint program with Memorial University unconfirmed

5: Continuation of Nursing expansion; expansion of LPN to BScN, MN and PhD offerings

6: Undergraduate enrolment recovers within 5 years; expansion of undergraduate offering

7: Original submission to government (enrolment of 527); expansion of undergraduate offering

8: Projected increase of incoming cohort size from 69 to 96 (a 39% increase)

Purpose:	DECISION
Subject:	**Election of Senator on the Board of Governors**
Prepared by:	Pascal Robichaud, University Secretary
Prepared for:	**Senate**
Date:	September 17, 2025

ACTION

Election of a member of a Senator to the Board of Governors.

BACKGROUND

The University Act provides that two members of the Board of Governors be *elected by and from the Senate of the University*[1].

The Processes and Procedures of Senate stipulate that those Senator members of the Board are to be elected from among faculty members of Senate to a three-year term, or to until their term on Senate ends, whichever is shorter[2]. It also provides that the election is normally held at the first Senate meeting of the academic year.

The established practice is to have the election proceeds through nominations (including self-nominations) from the floor during a meeting of Senate, with the Senator receiving the most votes being elected.

The Senator elected to the Board will participate in their first meeting of the Board of Governors on October 7.

As recommended under the Governance Review, and in accordance with the University's commitment under the review, on September 18, 2025, the *Governance, Nominating and Appeals Committee* of the Board of Governors adopted a description of the role of a member of the Board, here appended for Senators' information.

RECOMMENDATION

That, on September 26, Senate elect with immediate effect one of its faculty members to the Board of Governors for a three-year term.

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[1] Paragraph 8 (1), section (e) of the University Act.
[2] Article 6.1 of the Processes and Procedures of Senate.

BOARD MEMBER, BOARD OF GOVERNORS

ROLE DESCRIPTION

Approved by: Governance, Nominating and Appeals Committee on September 18, 2025

Purpose

Members of the Board of Governors ("Board members") at the University of Prince Edward Island are fiduciaries of the University, entrusted with governing the institution in the public interest. They provide strategic oversight, ensure accountability, and support the long-term success of the University. As members of one of two primary governing bodies within UPEI's bicameral governance system, Board members work alongside Senate (the academic governing body) to uphold UPEI's mission, vision, values, and responsibilities to students, the province, and the public. Their collective role is to help the University navigate complexity and change with courage, compassion, and integrity.

Key Responsibilities

1. Governance, Legal, and Fiduciary Duties

- Act honestly, in good faith, and in the best interests of the University as a whole.

- Fulfill fiduciary duties of loyalty and care and comply with relevant legislation, Board by-laws, and University policies.

- Understand the respective roles of the Board and the Senate, and the distinct responsibilities of each under UPEI's bicameral governance structure.

- Maintain a clear distinction between:

- Strategic and policy-level governance (Board responsibility), and

- Academic matters and operational implementation (Senate and administration responsibility).

Note: While Board members may bring the perspective of the constituency from which they hail (e.g., faculty, students, government), they do not serve as representatives of those groups. All decisions must be made based on the best interests of the University as a whole.

2. Institutional Oversight and Strategy

- Provide informed input into the development and monitoring of the University's strategic plan, institutional goals, and performance measures.

- Be knowledgeable about the University's mandate, objectives, operations, and public role.

- Monitor progress on financial, reputational, strategic, and risk-related goals.

3. Financial and Risk Stewardship

- Review and approve the annual budget, audited financial statements, and material capital expenditures.

- Oversee institutional risk, internal controls, audit processes, and long-term financial health.

4. Participation and Board Effectiveness

- Attend all Board and assigned committee meetings, development sessions, and related events.

- Review materials in advance, ask questions, and engage thoughtfully and respectfully in discussions.

- Serve on at least one Board committee and contribute actively to its work.

- Participate in self-assessment and evaluation processes to support continuous Board improvement.

5. Communication

- Recognize that the Chair of the Board (or their express delegate) is the sole spokesperson on Board matters, and the President (or their express delegate) is the sole spokesperson on behalf of the University.

- Refer any requests for comment or information to the appropriate spokesperson and refrain from making unofficial statements about Board matters.

- Promptly communicate any significant concern from the community to both the Board Chair and President.

- Maintain the confidentiality of all in-camera or sensitive discussions.

6. Ethical, Collegial, and Compassionate Governance

- Govern with integrity, independence, respect, and professionalism.

- Demonstrate compassion and awareness for those in the university community who may have experienced or may be experiencing fatigue, stress, or hardship, particularly during times of uncertainty, transition or crisis.

- Be courageous and principled in the commitment to do the right thing for the institution and its communities, especially in difficult or complex situations.

- Consider the impact of decisions on key stakeholders, demonstrate this through asking questions and raising issues, and treat stakeholders fairly and equitably, while acting in the best interests of the University.

- Disclose any real, potential, or perceived conflicts of interest to the Board Chair, Committee Chair or University Secretary, and withdraw from related discussions or decisions in accordance with the University's conflict-of-interest policy.

- Maintain the confidentiality of sensitive Board materials and discussions, particularly during in-camera sessions.

- Support a Board culture that is inclusive, respectful, and open to diverse perspectives.

7. Public Trust and Institutional Advocacy

- Act as stewards, safeguarding the autonomy, reputation, and integrity of the University.

- Promote transparency, inclusion, sustainability, and reconciliation with Indigenous Peoples.

- Serve as ambassadors of the University in the community, advancing its mission through networks, advocacy, and service.

- Support the President and senior administration in advancing the University's goals and reputation.

Qualifications and Attributes

- Commitment to postsecondary education and public service.

- Independent judgment, integrity, and the ability to collaborate in a complex governance environment.

- The skills matrix outlines the key competencies required for effective governance by the Board of Governors. While individual Board members are not expected to possess all of these skills, it is important that the Board as a whole reflects a well-distributed and balanced range of these competencies to fulfill its responsibilities effectively.

- Appointees should be willing and able to devote sufficient time and attention to Board work.

Time Commitment

- Attend 4–6 Board meetings per year, along with committee work, retreats, and preparation.

- Estimated time commitment: 12–20 days per year, depending on responsibilities.

Term of Appointment

- Board and Government appointed members are typically appointed for a three-year term, renewable in accordance with the University Act. Terms for other appointed or elected members vary according to the rules of the appointing bodies (e.g. Senate, Alumni Association).

Support and Orientation

- Board members receive comprehensive orientation and ongoing access to professional development opportunities.

- Governance support and information are provided through the University Secretariat.

Briefing Note | UPEI Strategic Plan (2025-2030) Development Process (as of Sept 5/25)

Process Goals

1. establish a foundation for strategic direction and culture change
2. support the mission, vision, and values of UPEI through a clear strategic direction
3. encourage a collegial process with a focus on engagement of our University community

Consultation and Engagement

- 1 year process
- over 700 participants:
    - 23 internal sessions
    - 4 external sessions
    - 4 strategic plan workshops (Board, Senate, Senior Leadership, Steering Committee)
    - 14 University Strategic Plan Steering Committee Meetings/Working Sessions
- updates provided to Board and Senate during process
- draft shared with campus and broader community for input (provided online for two weeks)
- community input used to revise draft for sharing at Joint Session of UPEI Board of Governors and Senate
- draft discussed with leadership team to highlight priorities, roll out, and information sharing

Consultation Input: Strong Consistency

- sustainability in all forms
- EDI and sense of belonging
- commitment to reconciliation
- improve policies and processes
- greater student-centric focus
- build research and innovation
- recruitment and retention of talent (student, faculty, staff)
- prioritize health and wellbeing
- enhance curricular cohesion and innovation
- improve communication and connectivity to better support students, work processes, overall mission (digital transformation)

Governance Process

- UPEI Senate Meeting (Sept 26, 2025)
- UPEI Board of Governors (Oct 7, 2025)

Launch and Implementation

- upon approval of strategic plan
- implementation framework, operational plans, and evaluation metrics to be developed
- progress reporting to be structured and public

MAKING OUR WORLD A BETTER PLACE:

UPEI STRATEGIC PLAN
2025-2030

FINAL DRAFT

UNIVERSITY
of Prince Edward
ISLAND

MAKING OUR WORLD A BETTER PLACE:
UPEI STRATEGIC PLAN (2025–2030)

President's Message

This is an exciting and pivotal time at UPEI. We are adapting in constructive and innovative ways that will enrich the experiences of our community and amplify our impact—both here at home and across the globe.

The landscape of post-secondary education is shifting. Federal restrictions on international students and evolving provincial funding models are reshaping how universities operate. Students, too, are changing, approaching their education with a longer view and seeking flexible, multi-institutional pathways to build credentials.

At the same time, the broader context of 2025 is marked by uncertainty: persistent threats to the global and local economy, the urgent and visible impacts of climate change, and the growing influence of socio-political forces at every level.

These changes are not just challenges; they are opportunities for UPEI to lead, adapt, and reimagine how we deliver education that prepares our graduates for a rapidly changing world. In asking ourselves what role universities and especially UPEI must play in such a complex and ever-shifting context, our answer is clear: to make our world a better place.

At UPEI, our greatest contributions lie in our graduates and in the scholarship and research of our faculty.

Our graduates leave our University and disperse across our Island, our country, and our world, equipped to take on complex challenges in human, animal, environmental, technical, biological, health, performing arts, sports, and socio-political fields. They are innovators and problem-solvers, grounded in principles of equity, diversity, and inclusion, and guided by an extraordinary commitment to reconciliation with Indigenous peoples on PEI and across Canada.

Our scholars and scientists push the boundaries of understanding and discovery. Their work creates pathways to solutions, advancing knowledge that supports people, animals, communities, and ecosystems.

The reach of UPEI is wide and deeply impactful. From the One Health initiative addressing human, animal, and environmental well-being, to the sciences, humanities, and arts, we contribute to every dimension of society. Our programs produce not only skilled professionals but also empathetic leaders who are ready to make a difference. To sustain this impact, we must continue to offer strong, accessible programs, protect our independence, and ensure sustainability is woven into everything we do.

UPEI is actively and conscientiously pursuing innovative approaches to create a culture of trust, safety, and inclusion on our own campuses, and extending these to our close partners and communities. Through the ambitious and steadfast implementation of the *UPEI Action Plan*, we are calling on every member of UPEI to help us create the kind of institution where people and communities can truly thrive.

This transformation requires discipline and accountability. Each year, we will set clear goals, define the measures that matter, and revisit them to assess our progress. In five years, we will be able to demonstrate, clearly and confidently, the impact of our choices and collective actions.

Every one of us has a role to play. Big changes and small daily actions alike move us closer to a better world. Every act of kindness, every effort to support one another, every commitment to work with our environment and our communities contributes to lasting change. Together, through our teaching, our research, and our shared commitment, we will make UPEI and our world a better place.

Wendy Rodgers, BA, MA, PhD
President and Vice-Chancellor

Message from the Board Chair

Facing the future, UPEI is ready for exciting changes. Setting strategy is not easy, as the world is increasingly dynamic and full of surprises. Yet UPEI has captured some important new characteristics of itself in this Strategic Plan, as well as reflections of and recommitment to important traditions.

UPEI will mature in all areas of teaching, learning and research, expanding its reach, and lifting up its people. And all of this is taking place while UPEI is continuing to heal from historic challenges. Much like an athlete recovering from an injury, UPEI is coming out stronger and more talented, while continuing to tend to and care for itself.

UPEI's history of strong community, innovation, and sustainable practices allow it to mature on a strong foundation. In this strategy, we remember who we are, where we have come from, and the opportunity associated with where we are going.

This is a rewarding and exciting time to be at UPEI, and I am so honoured to work with the UPEI community at this time. Thank you to all of the contributors to this important Strategic Plan, for both your time and talents.

Shannon MacDonald, FCA, CPA, ICD.D
Chair, UPEI Board of Governors

Developing our Future Direction

Making our world a better place: UPEI Strategic Plan (2025–2030) is the result of a year-long community discussion on the future of our University and the direction for the coming five years.

Our goal in developing the strategic plan was to ensure a collegial process with a focus on the engagement of our community. In supporting this goal, community members were encouraged to speak candidly, and we listened closely. We welcomed feedback, provided all input to the steering committee, and continuously and iteratively reflected the emerging themes back to our audiences as we progressed. We sought to identify the community's consensus foundations for a clear strategic direction and ongoing culture change. Input gathered throughout the process and across all members and sectors of the community was remarkably consistent.

The resulting strategic plan outlines three strategic pillars for UPEI—Thriving People and Communities; Innovative and Connected Teaching, Research, and Scholarship; and Sustainability. The commitments and

goals for each pillar are articulated. Together, they inform UPEI's strategic direction for the next five years.

More than 700 people from the University and broader community provided input on our strategic direction through 23 sessions and other methods of contributing. This input included emphasizing our focus on our students and their educational journeys; prioritizing the well-being of all our people within an environment of people-focused systems and support; and committing to stronger policies, processes, connectivity, alignments, and effectiveness across the University.

We also have a focus on our own institutional sustainability. We are accountable to our community to ensure UPEI is able to robustly bolster the success of our students, employees, communities, and province.

Land Acknowledgment

The University of Prince Edward Island stands on traditional and unceded Mi'kmaq territory.
Epekwitk (PEI), Mi'kma'ki, is covered by the historic Treaties of Peace and Friendship.
We pay our respects to the Indigenous Mi'kmaq People who have occupied this Island
for over 12,000 years—past, present, and future.

The UPEI Strategic Planning Process

Phase 1: Initiation
(September to October 2024)

In advance of initiating the planning process, the timeline and approach was confirmed with the UPEI Board of Governors. A Call for Expression of Interest was shared with our broader community to establish a diverse and engaged University Strategic Plan Steering Committee. A consultation schedule was developed, and outreach was initiated.

Phase 2: Consultation
(October 2024 to February 2025)

Consultations with internal and external community members (students, staff, faculty, alumni, community organizations, and sector and industry representatives) took place in the form of flipped consultations, traditional consultations, and surveys. Strategic planning workshops were held with the UPEI Board of Governors, Senate, and senior leadership to conduct situational analyses and establish priorities. President's town halls were held to raise awareness of plan development and encourage continued participation.

Phase 3: Development of Draft Strategic Plan
(March to April 2025)

Following a review of input received in Phase 2, consultation was continued in this phase by reframing themes and ideas, and to encourage additional input from community segments that had less representation in Phase 2. This aided in validating the input and themes and ensuring these were accurately captured. Following validation, the vision, values, and strategic priorities for the plan were drafted.

Phase 4: Finalizing the Plan
(May to August 2025)

This phase was extended by three months to enable intensive Steering Committee work and further refinement of the plan. This included discussions about core values, alignment of priorities, and identifying and addressing any critical gaps. This phase also identified key aspects to be shared with those leading the development of operational planning, outcomes, and measures once the plan was approved. A joint session of the UPEI Board of Governors and UPEI Senate was held at the end of August to review the draft plan and to seek input and guidance prior to finalizing the strategic plan for approval.

Phase 5: Governance Reviews
(September to October 2025)

In this phase, the *UPEI Strategic Plan (2025–2030)* was provided to the UPEI Senate for information at its September meeting. The strategic plan was then submitted to the UPEI Board of Governors for approval at its October meeting. The plan was approved by the Board of Governors on XXXXX. Beginning in October, UPEI's senior executive team will lead the development of operational planning, measures, and progress reporting.

Consultation and Engagement

At the core of *Making our world a better place: UPEI Strategic Plan (2025–2030)* is the University's commitment to our students and lifelong learners.

Participants in our consultation process provided a strong and consistent message that prioritizing student success must be a primary focus of UPEI's strategic direction.

This priority is reflected throughout the strategic plan. It includes optimizing our students' growth, curiosity, knowledge, and experiences within a well-structured and resourced learning environment that is committed to understanding their evolving needs and lifelong development within a complex world.

2 Surveys

• Campus Priorities and Opportunities

• Looking to the Future

23 Internal Consultaiton Sessions

• Flipped Consultations

• President's Town Halls

• Campus Discussion Groups

4 Externals Consultaiton Sessions

• PEI Community Visits

• Sector Partner Forum (Industry, NFPs, Service, Community, NGO and Government Partners)

4 Strategic Planning Workshops

• UPEI Board of Governors

• UPEI Senior Leadership and UPEI Senate

• University Strategic Plan Steerning Committee

• Visiting throught leader

14 University Strategic Plan Steering Committee Meetings and Working Sessions

1 Online Sharing of Draft UPEI Strategic Plan for Community Input
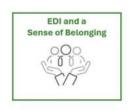
**more than two dozen consultation and engagement events
700+ participants over 10 months**

Consultation Input
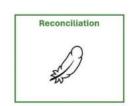
Strong consistent themes

Sustainability in all Forms	EDI and a Sense of Belonging	Reconciliation	Policy and Process Improvements	Student-focused Supports, Services, Success
Research and Innovation	Recruitment and Retention	Health, Safety, and Well-being	Curriculum Renewal and Innovation	Digital Transformation

Mission

The University of Prince Edward Island, founded on the tradition of liberal education, exists to encourage and assist people to acquire the skills, knowledge, and understanding necessary for critical and creative thinking, and thus prepare them to contribute to their own betterment and that of society through the development of their full potential. To accomplish these ends, the University is a community of scholars whose primary tasks are to teach and to learn, to engage in scholarship and research, and to offer service for the benefit of our Island and beyond.

Vision

UPEI aspires to transform lives and communities through lifelong learning. With teaching and research at the heart of our identity, UPEI connects the Island and the world. UPEI enables learners to explore, grow, and discover their interests and their potential.

Together, we share the purpose of making our world a better place.

UPEI's Commitment To Reconciliation

UPEI is committed to advancing reconciliation through higher education.

As a community, our University commits to the role we must play in achieving and promoting an understanding of Indigenous history and culture and supporting respectful relationships.

UPEI recognizes that discussions in this era of truth and reconciliation have unveiled difficult facts within our country's history. However, we know that education is vital to understanding the history and effects of colonialism and fully engaging with the process of reconciliation.

Working together and in alignment with the *UPEI Indigenous Strategic Framework and Initiatives, Pesk'tek—The Path Ahead: The Journey to Reconciliation and Action Reform*, we must use learning and knowledge as a catalyst for meaningful change here on Prince Edward Island and around our world.

Core Values

Academic Freedom

Seeking and examining evidence and the pursuit of truth are guiding principles for universities. UPEI supports the principles of academic freedom in teaching, research, scholarship, and creativity; publication and collections; and scholarly discourse. The right to academic freedom carries with it the duty to use this freedom in a responsible way.

Accountability and Integrity

We act ethically, and with honesty, transparency, and integrity. We are committed to decision-making that aligns with our values. Individually and collectively, we have a responsibility to each other and the larger community for the impacts of our decisions, actions, and behaviours. Our policies and procedures will encourage respect, empathy, trust, and support.

Pursuit of Excellence

We are committed to continuous improvement of the quality of our policies, processes, and programming, as well as our employee and learner environments. This includes fostering critical thinking, a culture of lifelong learning, and the pursuit of excellence in our teaching, research, and service, and our administration, operations, and technology. It also means innovative recruitment of scholars, employees, and students eager to support the mission of UPEI.

Equity, Diversity, Inclusion, and a Sense of Belonging

We believe in equity, diversity, and inclusivity that supports an environment hallmarked by a sense of belonging. To achieve this, we value, respect, and support each other and build pathways for people to be recognized, appreciated, and connected. We welcome diverse perspectives. In addition, we are committed to providing constructive spaces for employees and students to speak up and be heard and to debate ideas. The well-being, health, and safety of our people underpin our decision-making.

Reconciliation

UPEI acknowledges the traditions and contributions of Indigenous peoples of Canada and the world. We continue to work towards meaningful relations, inclusive education, and actions that support learning, truth, and reconciliation. Through an ongoing journey based on the recognition of rights, respect, and partnership, we are committed to renewed relationships by building a collaborative understanding of how the past and present influence the future.
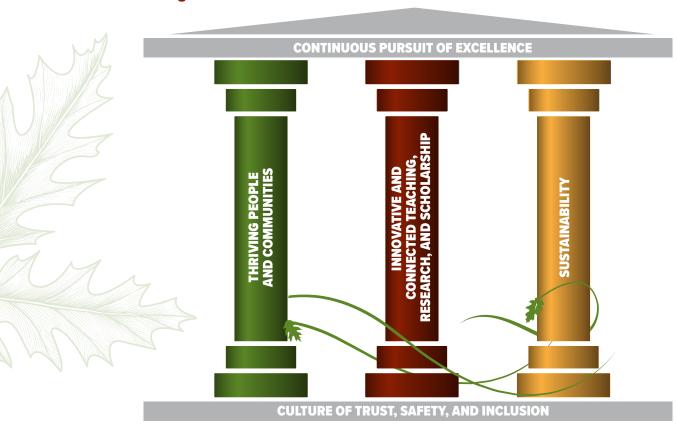
UPEI's Strategic Objective

UPEI will be the university of choice for Islanders and a top destination in Atlantic Canada for learners from across Canada and the world.

We will achieve this by delivering outstanding learning and experiences in a welcoming environment that values integrated and inspiring teaching, learning, and research.

Together, our people, graduates, and research and scholarship will contribute to making our world a better place.

UPEI's Strategic Pillars

CONTINUOUS PURSUIT OF EXCELLENCE

THRIVING PEOPLE AND COMMUNITIES

INNOVATIVE AND CONNECTED TEACHING, RESEARCH, AND SCHOLARSHIP

SUSTAINABILITY

CULTURE OF TRUST, SAFETY, AND INCLUSION

Strategic Pillar 1
Thriving People and Communities

Rationale: Our purpose as a university is to contribute to bettering people and society. The development of our people within inclusive and respectful learning and work environments will be the foundation of all University initiatives.

Commitment: UPEI will foster an inclusive, healthy, collaborative, and supportive environment where our students, faculty, and staff can unlock their potential and contribute to their local and global communities.

This includes

- fostering a culture of safety, trust, and inclusion;
- reconciliation with Indigenous peoples;
- supporting and delivering enriched experiences and refined systems and processes for our students, faculty, and staff that enable them to explore and develop their abilities and contributions.

Pillar 1 Goals

1. Continue to implement the *UPEI Action Plan: Building a Culture of Trust, Safety, and Inclusion.*

2. Ground EDI practices in integrity and consideration of our community members' safety, well-being, and dignity.

3. Ensure effective communications, information sharing, and connection within UPEI and with our communities.

4. Assess and address mental health support and services.

5. Support initiatives to support the overall health and well-being of our campus community.

6. Increase participation and support of Indigenous students, faculty, and staff.

Strategic Pillar 2
Innovative and Connected Teaching, Research, and Scholarship

Rationale: UPEI's size and scale allow us to reach across campus, disciplines, and service units to work together in unique ways. We will leverage our size, scale, and strengths to develop creative ways of connecting people and shared goals.

Commitment: Working together, we will make meaningful contributions to our world by fostering innovation and encouraging collaboration to address complex challenges by growing knowledge, ideas, and people.

This includes the following:

- UPEI will be a model for collaboration.

- We will increase connectivity and remove silos to better promote information sharing and team-focused approaches.

- We will develop effective ways of sustainably connecting with provincial, national, and global sectors and communities to carry out our mission.

Pillar 2 Goals

1. Encourage boundary-spanning activities and remove barriers to collaboration to enable multi-disciplinary research and scholarship of mutual benefit to community members.

2. Increase internal entrepreneurship and innovation within institutional initiatives.

3. Build innovative pedagogical and investigative approaches to enhance teacher, researcher, and learner experiences and interactions.

4. Establish UPEI as a regional leader in providing a dynamic and collaborative learning environment where students are actively involved in the learning process through engaged, process-oriented teaching.

5. Encourage multi-disciplinary research and scholarship across the institution and of mutual benefit to community members.

6. Promote the transfer and exchange of knowledge to amplify UPEI's research impact.

7. Develop external partnerships to pursue mutually beneficial community- and industry-engaged education, research, and service initiatives of impact.

8. Develop Indigenous partnerships to better understand and include Indigenous knowledge in teaching and research.

Strategic Pillar 3
Sustainability

Rationale: Meeting short-term needs in ways that protect and plan for the long-term health of our institution, partners, and communities is paramount. We are committed to sustainability in our operations and finances, managing our environmental footprint and impact, and contributing to the well-being of people and communities through a focus on social and cultural sustainability.

Commitment: UPEI will carry out its activities with a commitment to social, environmental, and financial sustainability.

This includes

- optimizing institutional resilience and adaptiveness while sustaining our core mission and values;
- studying and continuously improving our internal processes and fiscal stewardship to ensure the long-term sustainability of UPEI;
- contributing to our greater community through engaged programming that helps solve complex social challenges.

Pillar 3 Goals

1. Become a leader in developing and implementing sustainable practices on campus by leveraging expertise in areas such as climate change, sustainable design, environmental science, and cleantech theory into everyday practices on campus.

2. Pursue opportunities to leverage University-developed initiatives into larger-scale community impacts in areas such as environmental stewardship, climate change, and cultural preservation.

3. Create and support community-engaged research on sustainability threats and outcomes, including a focus on the United Nations' Sustainable Development Goals (SDGs).

4. Enhance data analysis, data governance, and proactive, integrated planning to ensure readiness for challenges.

5. Improve the alignment of policies, processes, institutional planning, and talent development to optimize decision-making and resource allocation.

6. Implement strategic enrolment management (SEM) to improve student recruitment, retention, and overall student experience and success.

7. Institute a multi-year operational plan and revenue strategy.

8. Expand sustainability education across curricula through program innovation, new forms of learning, and digital transformation.

Operational Planning, Progress Measures, and Information Sharing on Outcomes

Implementation of the *UPEI Strategic Plan (2025–2030)* will include annual development and alignment of operational plans and activities, with metrics, to support the implementation of strategic priorities.

This will require collaborative approaches to annual planning, establishing key performance indicators, progress measures, and an evaluation framework. Progress monitoring of the strategic plan will be ongoing. Adjustments to planning initiatives will be carried out as needed based on as much evidence as is available.

Progress results will be shared with the University and broader community on a regular basis.

Acknowledgements

We are grateful to the more than 700 participants who took part in building the *UPEI Strategic Plan (2025–2030)* by participating in the consultation process and sharing insights and ideas for a flourishing University.

Thank you to UPEI students, faculty, staff, and alumni for providing input in many ways—from personal feedback, responding to surveys, and collective discussion sessions. Thank you as well to our community members from numerous sectors who provided candid feedback on ways UPEI can better engage with our communities and build impacts.

Appreciation is expressed to The Chapman Group for their partnership in facilitating consultation sessions and organizing participant feedback. Thank you, also, to the UPEI Senate and the UPEI Board of Governors for their thoughtful input.

The University Strategic Plan Steering Committee provided considerable time and effort to ensure the input of our community was reflected in accurate and meaningful ways. We are grateful for the time and dedication of this group in brainstorming, listening to our community, synthesizing input and priorities, and being courageous to ask hard questions and challenge the status quo.

UNIVERSITY STRATEGIC PLAN STEERING COMMITTEE

CO-CHAIRS
Dr. Wendy Rodgers | President and Vice-Chancellor
Dr. Suzanne Kresta | Dean, Faculty of Sustainable Design Engineering

MEMBERS
(listed alphabetically)

Doug Burton | Director, IT Operations

Dr. Corinne Chappell* | Advisor on Indigenous Affairs, Office of L'nu Relations and Reconciliation

Lewis Creed* | UPEI Alumni

Lucky Fusca | Sexual and Gender Diversity Specialist, EDI and Human Rights

Fairouz Gaballa* | Administrative Assistant, UPEI Cleantech

Rebecca Gill* | Director, Strategic Priorities and Policy Development, Faculty of Medicine

Dr. Kuljeet Grewal | Assistant Professor, Faculty of Sustainable Design Engineering

Dr. Beibei Jia* | Assistant Professor, Faculty of Veterinary Medicine

George Jiang* | Past President, UPEI Student Union

Roshni Kishor | UPEI Graduate Student

Megan MacLean* | Interim Associate Vice-President, Students

Dr. Annerose Mauz | Sessional Instructor, McDougall Faculty of Business

Charlotte McCardle | Director, Strategic Planning

Sonia O'Connor* | Administrative Assistant, Faculty of Medicine

Dr. Christopher Power | Associate Dean, Graduate Studies and Research, Faculty of Science

Dr. Jessica Strong | Assistant Professor, Psychology; Director, Clinical Training, Doctor of Psychology, Faculty of Arts

Dr. Charlene VanLeeuwen* | Manager, Teaching and Learning Centre

Hexi Wang | UPEI Graduate Student

*Steering Committee members who are also UPEI Alumni

Together, we remain committed to making our world a better place through the transformational power of higher learning.

FIDES SCIENTIA BENEFICIUM

UNIVERSITY
of Prince Edward
ISLAND

Briefing Note to Campus Culture Oversight Committee on
Harassment and Discrimination Policy and Sexual Violence Policy
September 9, 2025

The UPEI Action Plan: Building A Culture of Trust, Safety and Inclusion (the "Action Plan") commits to a new harassment and discrimination policy for the University. This commitment was made in response to the *University of Prince Edward Island Review* by Rubin Thomlinson, which recommends the replacement of the current Fair Treatment Policy (FTP), and following the motion passed by the UPEI Board of Governors on November 28, 2023, to this effect.

A Review Committee will be struck, in accordance with the current Fair Treatment Policy (12.7.1), to engage in a university-wide consultative process, with the aim of arriving at a recommendation for a new Harassment and Discrimination Policy and Sexual Violence Policy.

> *FTP 12.7.1 The President will constitute a committee composed of interested parties to review this policy every three years. The parties may include a broad cross section of the university community such as: The Board of Governors, administration, students, and employees. The Policy review committee may receive recommendations from the appropriate interest groups. The President may elect to involve health professionals, community representatives or other interested groups in the review process as resource persons. The Fair Treatment Advocate would also be a resource to the committee.*

The Review Committee was selected by the University among individuals who responded to a call for expressions of interest to participate, with a view to ensuring a broad representation across constituency groups in the UPEI community (with diverse experiences and backgrounds).

The Review Committee, co-chaired by President Rodgers and, as elected by the Review Committee, Lucky Fusca, Sexual and Gender Diversity Specialist, was mandated to develop a new Harassment and Discrimination Policy and Sexual Violence Policy, following a university wide consultation process, in accordance with the following requirements.

- The new Harassment and Discrimination Policy shall adhere to the following set out in the UPEI Action Plan at Goal 4, Action 3:
  - Replace the Fair Treatment Policy with a comprehensive Harassment and Discrimination Policy that covers all campus members and reflects the new structure of the EDI and Human Rights Department
  - Ensure the new policy incorporates all recommendations of the UPEI Review
  - Ensure the new policy reflects feedback from survivors of harm at the University
  - Ensure the policy is trauma-informed and procedurally fair
  - Ensure the new policy aligns with legislative requirements, such as PEI Occupational Health and Safety Act and Employment Standards Act
- The revised Sexual Violence Policy shall adhere to the following set out in the UPEI Action Plan at Goal 4, Action 4:

- Finalize revisions to the UPEI Sexual Violence Policy
- Ensure the new policy is comprehensive and implements all the recommendations of the UPEI Review
- Ensure the revised policy is procedurally fair, and conforms to legislative requirements
- Ensure that the experiences of victims of sexual harassment/assault, including within the context of student residences, are in the revisions to the Policy

A list of members and meeting dates is included in *Appendix A*.

In addition to reviewing peer-reviewed research and policies from other universities, the Committee consulted broadly, including hosting information sessions, inviting feedback from the university community on draft policies and seeking targeted input from key groups and individuals. Preliminary and final legal reviews were also completed on draft policies. A list of consultations and participation numbers is provided in *Appendix B*.

REVIEW PROCESS TIMELINE

Following is a timeline for the policy review and development process:

- November to December 2024 - Planning and Committee Selection
- November 2024 – Dedicated Page on External Facing UPEI Website Established (for communicating information related to the Fair Treatment Policy Review)
- January 21, 2025 – Review Committee Announced
- January and February 2025 – Research and Review
- February 2025 – Emails from Committee Members Requesting Input from Co-workers on Priorities to Consider When Developing the New Policies
- March and April 2025 – Community Information Sessions with Q and A
- April 22, 2025 – Draft Policies Released Online to UPEI Community for Feedback
- April 28, 2023 - Preliminary Legal Opinion
- July 3, 2025 – Revised Legal Opinion
- August 2025 – Policies in Final Draft

POLICY HIGHLIGHTS

The new UPEI Harassment & Discrimination Policy and UPEI Sexual Violence Policy are built on the University's ethical and legal responsibility to maintain an environment free from discrimination, harassment, sexual harassment, and sexual violence.

The policies provide:

- Mechanisms for prevention of Discrimination, Harassment and Sexual Harassment and Sexual Violence at the University and in the conduct of university business.
- Processes to investigate and address reports of Discrimination, Harassment, Sexual Harassment and Sexual Violence.

Each policy includes seven stages beginning with Contacting a Safe Disclosure Officer, who will advise the person regarding their options under the policy. When allegations of Sexual Harassment are raised, the Safe Disclosure Officer will consult the Sexual Violence Policy and the Harassment & Descrimination Policy to determine which policy best applies to the matter.

The policies are comprehensive, trauma-informed, incorporate feedback from survivors of harm and comply with relevant legislation.

The Equity, Diversity and Human Rights Department is responsible to administer the policies, while the Vice President People and Culture is responsible to monitor effectiveness and recommend policy amendments.

The Board of Governors is responsible for:

- Approving the policies
- Approving periodic reviews of the policies
- Addressing allegations of violations of the policies where the Respondent is the President or a Board member.

RECOMMENDATION

At its most recent meeting the Fair Treatment Policy Replacement Committee endorsed the final versions of the UPEI Harassment & Discrimination Policy and the UPEI Sexual Violence Policy, confident that it has fulfilled its mandate and exercised due diligence in developing policies that will significantly contribute to creating a culture of trust, safety and inclusion in our teaching, learning, research, work and all that we do at UPEI.

It is therefore recommended that the Governance, Nominating and Appeals Committee recommends Board Approval of the new UPEI Harassment & Discrimination Policy and the UPEI Sexual Violence Policy and repeal of the Fair Treatment Policy.

APPROVAL AND IMPLEMENTATION

Following are proposed next steps:

- September 2025 – Review by Governance, Nominating and Appeals Committee
- October 2025 – Recommendation to Board of Governors for Approval of New Policies
- August 2025 – October 2025 – Seek agreement of UPEI Faculty Association regarding the repeal of the Fair Treatment Policy (currently contained in the UPEI – UEIFA Collective Agreement)
  - * the Fair Treatment Policy will continue to apply to UPEIFA members until this step is completed
- October 2025 to January 2026??? –Communication on Policies
- October 2025 - Policy Education Implementation to begin and continue annually
- October 2025 - Begin Policy Implementation (for relevant employee groups*)
- October 2026 – 1st annual Policy Review

Appendix A – Fair Treatment Policy Replacement Committee

The Fair Treatment Policy Replacement Committee was comprised by way of invitation to interested parties to provide an expression of interest in November, 2024. As of December 2, 2024, forty expressions were received.   Selections were then made to represent all constituencies of the university community. Once the selections were made, the committee met and identified gaps that included lack of representation of two unions, who were subsequently invited to nominate representatives. These individuals were added to the committee.

A special consultation meeting was held with individuals not selected to the committee to enable them to have early input on the process and to relay their thoughts on content and on processes related to the policy. This meeting was held February 3, 2025.

Committee Member	Role on Committee	Role at UPEI
Wendy Rodgers	Co-Chair	President and Vice Chancellor
Lucky Fusca	Co-Chair	Sexual and Gender Diversity Specialist
Patricia Boland	Voting Member	Lab Technician (CUPE 1870)
Ann Braithwaite	Voting Member	Faculty
Bobby Cameron	Non-Voting Member	Chief of Staff
William Clement	Voting Member	Security Services (CUPE 501)
Vanessa Corless	Voting Member	Student
Kelly Drummond	Voting Member	Associate Vice President, Human Resources
Ayodhya Foneska	Voting Member	Office of Study Abroad and International Partnerships
Kathy Gottschall-Pass	Voting Member	Faculty
Sushil Khatri	Voting Member	Student
Christian Lacroix	Voting Member	Faculty
James Reddin	Voting Member	Student Affairs
Margot Rejskind	Voting Member	Faculty Association
Travis Saunders	Voting Member	Faculty
Jonathan Spears	Voting Member	Faculty
Brian Thompson	Voting Member	Board of Governors
Geoff Tierney	Non-Voting Member	Principal, GTL Corporation
Hexi Wang	Voting Member	Graduate Student
MJ Wardle	Voting Member	Facilities Management (IBEW Members)

Committee Meeting Dates

- December 18, 2024

- January 16, 2025
- February 13, 2025
- February 20, 2025
- February 27, 2025
- March 3, information sharing event – Andrew's Hall
- March 13, 2025
- March 20, 2025
- March 27, 2025
- March 31, 2025
- April 10, 2025
- April 17, 2025
- April 29, 2025
- May 15, 2025
- May 16, 2025
- August 22, 2025

Appendix B- Policy Consultations

UPEI Faculty Association notified in virtual meeting with W. Rodgers on November 22, 2024

Community Information Sessions (including Q&A)

- Fair Treatment Policy Redevelopment Information Sharing Session – **March 3rd, 2025**
- Fair Treatment Policy Redevelopment Information Sharing Session - **April 3rd, 2025**
- Fair Treatment Policy Redevelopment Information Sharing Session - **April 7th, 2025**

Campus Feedback Requests (Form)

- Online Feedback form - **January 21st, 2025**
  - Requesting feedback regarding experiences with the current suite of policies and/or comments or suggestions to bring forward for the Committee's attention.
  - Twenty-nine responses were received from faculty, staff, students, alumnus and others
- Online Feedback form – **April 22nd, 2025**
  - Requesting feedback on the draft Harassment and Discrimination Policy.
  - Twenty-two responses were received

Targeted Consultations

- External legal review with expertise in trauma and EDI
  - Counsel was selected and agreed to by the FTP Replacement Committee

- o Nijhawan, McMillan, & Conlon, of Halifax was contracted
- o 1st review received April 28, 2025
- o 2nd review of revised policy received July 3, 2025 (H&D Policy) July 9, 2025 (SV Policy)
- UPEI Sexual Violence Prevention and Response Office
  - o April 28, 2025 letter – member of office
  - o April 28, 2025 letter – another member of office
- Joint Occupational Health and Safety Committee
  - o May 19 version – feedback dated June 2, 2025
- Director of EDI & HR Department
  - o Director, April 28, 2025
- Fair Treatment Advocate – HR Atlantic
  - o April 28, 2025
- EDI & HR Department
  - o Summary from Special Advisor and full department August 19, 2025

- Survivors of Harm
  - o Summary document provided by Brian Thompson January 16, 2025
  - o Confidential summary provided by Shannon MacDonald, who worked with survivors, to Wendy Rodgers & Brian Thompson
  - o Wendy Rodgers met with survivors virtually May 9th
  - o Wendy Rodgers received confidential follow up email May 11th

- Student Union
  - o Collected in person by Dr. Jane Ngobia, August 5, 2025
    - ▪ Follow up notes from SU August 5, 2025
- The unions were all invited to elect a representative to serve on the committee
  - o All unions selected a representative to participate on the committee
- The UPEI Faculty Association has a unique relationship to the policy in that the Existing Fair Treatment Policy is included in their collective agreement and cannot be amended without express written consent. We have been aware of that need through the entire development process for the new policies. We had originally intended to have the new policies approved and then work with the Faculty Association to have them replace the existing Fair Treatment Policy. The Faculty Association proactively pointed out this obligation in advance of the governance approval process. We responded inviting them to agree to accept the new policies at the time of approval. This would be the preferred arrangement. We will engage with the Faculty Association on these critical next steps.

University of Prince Edward Island	Policy No. TBA		Revision No. 0
Policy Title: Harassment & Discrimination Policy			**Page 1 of 21**
Creation Date: TBA	**Version Date:** TBA		**Review Date:** TBA
Policy Approval Authority: Board of Governors	**Designated Executive Officer:** Vice-President People and Culture		**WWW Access:** Yes

A. Preamble

1. This policy has been developed by and for our university community. It is rooted in the right and responsibility we all share to a culture of trust, safety and inclusion in our teaching, learning, research, work and all that we do at the university. We all have a role to play in building that culture; our community thrives when we treat each other with respect, and value each other's contributions.

2. The university has the ethical and legal responsibility to maintain an environment free of Discrimination, Harassment and Sexual Harassment. That responsibility includes awareness of what constitutes Discrimination, Harassment and Sexual Harassment, delivering proactive education, ensuring supervisors are monitoring the environment in their area(s) and are knowledgeable of reporting procedures, and responding to harassing or discriminatory behaviour in a timely and effective manner.

3. This policy protects against the 'silencing' of those who make a report of Discrimination, Harassment or Sexual Harassment. The use of non-disclosure agreements shall be prohibited except where they may be the expressed wish and preference of the person making a Report, in accordance with the university's policy. Reprisal and threats of reprisal are prohibited.

4. This policy protects the agency of the person making a Report. A person may choose to make an anonymous Report or choose to not participate in an Investigation but those choices do not supersede the right to procedural fairness for all participants and therefore may impact the process and potential outcomes available following an Investigation.

5. The processes for addressing a concern and/or making a Report are set out in stages to assist with setting out a clear and accessible process, not to imply that the stages are always sequential or that any given stage is a requirement.

6. While those who have been the subject of a violation of this policy generally have the right to choose the process and at what stage a violation is addressed, nothing in this policy precludes the right of the university to take action as may be necessary to meet its ethical and legal responsibility, and this may include initiating an Investigation.

B. **Purpose**

7.   The purpose of this policy is to provide a mechanism for the prevention of Discrimination, Harassment and Sexual Harassment at the university and in the conduct of university business, and a process to investigate and address reports of Discrimination, Harassment and Sexual Harassment.

8.   This policy has been developed to outline the measures UPEI is taking to prevent, investigate, and address Discrimination, Harassment and Sexual Harassment consistent with the requirements of applicable legislation, including but not limited to the: *Employment Standards Act*, *Human Rights Act, Occupational Health and Safety Act Workplace Harassment Regulations,* and the *Non-disclosure Agreements Act.*

C. **Principles of Application** (listed alphabetically)

9.   Academic freedom: The freedom to teach and conduct scholarly work guided by curiosity and intellectual inquiry, without deference to prescribed doctrine, is fundamental to our university. Academic freedom can only be achieved in an environment in which Discrimination, Harassment and Sexual Harassment are not tolerated.

10.   Confidentiality: the university recognizes the importance of confidentiality for everyone involved in an allegation of Discrimination, Harassment or Sexual Harassment. The university will make every reasonable effort to balance confidentiality with its legal responsibility to provide a work and study environment free from Discrimination, Harassment and Sexual Harassment.

11.   Conflicts of Interest: this policy recognizes that conflicts of interests may arise at various points in its processes; these will be defined and addressed in accordance with the university's Conflict of Interest policy and the principles of procedural fairness.

12.   Cumulative Impact: It is important for the university to track trends and cumulative incidents that contribute to risk of violations of this policy so that proactive measures may be taken.

13.   Freedom from reprisal: members of the university community have a right to participate in proceedings under this policy without fear of reprisal or retribution.

14.   Freedom of expression: this is a cornerstone of scholarship at the university, but like other *Canadian Charter of Rights and Freedoms* rights, it is not an absolute right nor a defence to Discrimination, Harassment or Sexual Harassment. The *PEI University Act* also specifies the freedom of the university to be a place open to expression of all doctrines, and creeds, religious, political or philosophical.

15.   Individual support: all Reporters, Respondents and other participants, may choose to have a support person present at all steps in the processes of this policy; this may include, for example, a trusted friend, colleague or union representative. The chosen support person should not be a likely witness in any Investigation of the matter.

16.   Power imbalances: Power imbalances exist in organizations that can be exploited or prevent the reporting and management of Discrimination, Harassment and Sexual Harassment. Power imbalances can also obscure or exacerbate proper and improper behaviour and interpersonal relations. The university strives to create policy that respects all members of the university community without deference to power. The university recognizes that one of the purposes of human rights laws and policies is to assist members of groups that have been historically disadvantaged and disempowered in our society.

      Romantic or intimate relationships between members of the university community may give rise to Discrimination, Harassment or Sexual Harassment under this policy. *(Also refer to the university's applicable policy related to these relationships - to be developed, and the Conflict of Interest Policy.)*

17.   Procedural fairness: Reporters and Respondents have the following procedural fairness protections at every stage or point of decision under this policy: the right to an unbiased decision-maker, notice, the right to be heard, timeliness, and reasons for decisions.

18.   Safe disclosure: members of the university community who experience or observe incidents of Discrimination, Harassment or Sexual Harassment have the right to report those incidents in a manner where they feel safe, without fear of reprisal, particularly in circumstances of a power imbalance between individuals.

19.   Substituted Authority: where a specific responsibility under this policy falls to a person or Office that is also a participant in a given matter, that responsibility shall be assumed by the person's supervisor or the Office's next level of authority.

20.   Timeliness: this policy prescribes timelines for action.   Timelines may be altered by request of a Reporter or Respondent to the Department of Equity, Diversity, Inclusion, and Human Rights or Substituted Authority, as applicable. The university may also alter timelines only where necessary in the following circumstances: to preserve the integrity of this policy and its processes; to ensure procedural fairness; or as may be required by law.

21.   Trauma-informed: This policy acknowledges the harm endured by Reporters and survivors along with having awareness of the impacts that trauma has on an individual's emotional, cognitive, physical and sexual wellbeing.[1]

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[1] (source: Eerkes, D., De Costa, B. & Jafry, Z. (2021). A Comprehensive Guide to Campus Gender-Based Violence Complaints: Strategies for Procedurally Fair, Trauma-Informed Processes to Reduce Harm. Possibility Seeds' Courage to Act: Addressing and Preventing Gender-Based Violence at Post-Secondary Institutions in Canada, page 18)

D.   Scope and Application

22.   This policy applies to all members of the university community with respect to alleged incidents of Discrimination, Harassment or Sexual Harassment that occur, whether on or off campus and through any medium (including electronic):

    a. In the course of university-related programs, operations, or activities;

    b. Using university-owned or run property or equipment;

    c. While participating in university-sponsored or sanctioned activities, events or organizations; or

    d. In the context of non-university activities where the conduct has a material negative impact on a member of the university community's living, learning and/or working environment and in a context where the conduct has a substantial connection to the university.

23.   When allegations of Sexual Harassment are raised, the Safe Disclosure Officer will consult the Sexual Violence Policy to determine which policy best applies to the matter. Allegations of Sexual Harassment will normally proceed under the Sexual Violence Policy unless the matter also includes allegations of Discrimination and Harassment falling within the scope of this policy. Allegations of Sexual Harassment must proceed under either the Sexual Violence Policy or this policy, not both, and a party is not permitted, after exhausting the processes in one policy, to proceed under the other policy.

E.   Roles and Responsibilities (presented in alphabetical order)

24.   <u>All members of the university community</u>: have the responsibility to generally inform themselves of this policy, attend any mandatory training, and refrain from behaviour that violates this policy.

25.   <u>Board of Governors</u>: has the fiduciary duty to perform the powers of Board laid out in the *University Act* to ensure the success, integrity, financial, and administrative sustainability of the university. Within that broad duty, the Board of Governors has the responsibility to approve this policy, approve periodic renewals of this policy, address allegations of violations of this policy where the Respondent is the President or a member of the Board of Governors.

26.   <u>Department of Equity, Diversity, Inclusion, and Human Rights</u>: reports to the Vice-President, People & Culture and has a communication line directly to the Board of Governors with respect to matters of this policy. The Department is generally responsible for administering this policy, including: establishing and publishing rules, plain-language companion materials, summaries, guidelines and forms in respect of processes under this policy; establishing and delivering training, which may be mandatory or optional, for the university community in the interpretation and application of this policy and the prevention of Discrimination, Harassment and Sexual Harassment; maintaining

appropriate records both by incident and cumulative, and maintaining confidentiality over those records, subject to all applicable policies, processes, and laws; aggregate reporting to the Vice-President, People & Culture on matters relating to this policy; and undertaking those responsibilities expressly set out in accordance with this policy.

27. Faculty and Staff: have the responsibility to generally inform themselves of this policy, attend any mandatory training, and refrain from behaviour that violates this policy.

28. vacant

29. Safe Disclosure Officer: is a member of the Department of Equity, Diversity, Inclusion, and Human Rights and the first point of contact for members of the university community to address questions about this policy, and to assist with engaging the policy. The Safe Disclosure Officer is responsible to coordinate supports and services available at the university to students and Reporters who are affected by Discrimination, Harassment and Sexual Harassment and to Respondents under this policy.

30. Students: have the responsibility to generally inform themselves of this policy, attend any mandatory training, and refrain from behaviour that violates this policy.

31. Supervisory roles: supervisors and university administrators are expected to personally uphold the policy at all times, monitor the environment in their area(s), be knowledgeable of reporting procedures and this policy, and to remind those who report harassing or discriminatory behaviour of the options for engaging this policy. Supervisors and university administrators may have an obligation to report matters brought to their attention directly to the Department of Equity, Diversity, Inclusion & Human Rights.

32. Unions: are advocates for building a culture of safety, trust and inclusion. They build awareness of this policy, and represent and support their members throughout its processes.

33. Vice President, People & Culture: has the responsibility to monitor the effectiveness of this policy and recommend amendments for approval of the Board of Governors, to oversee the effectiveness of the Department of Equity, Diversity, Inclusion & Human Rights, in its administration of this policy, and to report to the President in that regard, as may be directed by the President.

34. Vice-Presidents: Vice Presidents are responsible for approving and implementing any Immediate Measures and/or accommodations, on the recommendation of the Department of Equity, Diversity, Inclusion & Human Rights, and remedial and/or corrective action under Stage 5. (Where this policy references the "appropriate" Vice-President, that means the specific Vice-President within the reporting line of the Reporter or Respondent, as the context requires.)

F. **Statement of Commitment**

35. All members of the university community are entitled to a working, studying and living environment free from Discrimination, Harassment and Sexual Harassment as defined by this policy.

36. All members of the university community have a right to participate in processes under this policy without fear of reprisal or retribution.

37. As required by law, the university commits that it will:

   a. prevent Discrimination, Harassment and Sexual Harassment as far as reasonably practicable;

   b. take corrective action to address incidents of Discrimination, Harassment and Sexual Harassment;

   c. prevent and remedy Systemic Discrimination;

   d. not reprimand, seek reprisal, or discriminate against a member of the university community who has made a disclosure or Report in good faith;

   e. take corrective action against those who reprimand, seek reprisal, or discriminate against a member of the university community who has made a disclosure or Report in good faith.

G.   Confidentiality

38.   The university shall not disclose any identifying information about any person involved or the circumstances relating to the complaint to any person unless disclosure is necessary for the purposes administering the procedures of this policy, including investigating the complaint, providing accommodations, or implementing Immediate Measures. In all cases, the least amount of information possible will be shared.

39.   Confidentiality may also be limited in circumstances where a serious safety risk exists or the university has a legal obligation to share information. Examples of these circumstances include:

   a.   where the Department of Equity, Diversity, Inclusion, and Human Rights, in consultation with university administrators as appropriate, has identified a serious and credible risk of harm to a member of the university community or another person;
   b.   where there is a legal duty to report to authorities, such as a duty to report abuse under the Child, Youth and Family Services Act;
   c.   to respond to a subpoena or otherwise where the university has a legal obligation to cooperate in an extra-university judicial process.

40.   In any event, the disclosure of identifying information shall be subject to the university's obligations pursuant to the law, including but not limited to, the *Freedom of Information and Protection of Privacy Act*.

41.   Participants in this policy have a duty to maintain confidentiality as appropriate to preserve the integrity of the policy's processes. Participants may discuss matters in confidence with family, personal, professional or cultural advisors, therapists, union representatives and legal advisors.

42.   All records produced under this policy shall be maintained by the Department of Equity, Diversity, Inclusion, and Human Rights as required and permitted by the law.

43.   The use of non-disclosure agreements is prohibited under this policy except as may be permitted by the *Non-disclosure Agreements Act* and the university's policy.

H.   Process and Reporting

44.   This policy sets out a staged process for addressing allegations of Discrimination, Harassment and Sexual Harassment that allows for initiation of process and/or intervention proportionate to the circumstances, reflecting the seriousness of the matter, the level of readiness of the Reporter, and other considerations.

45.   The "Stage" refers to the point of entry into the process. All Stages are not all required.

46.   A person who believes they may have violated this policy is encouraged to proactively disclose the matter to a Safe Disclosure Officer for advice and possible early resolution.

47.   Nothing in this policy prevents a member of the university community from initiating an alternative proceeding, such as a complaint with the PEI Human Rights Commission, in accordance with the *Human Rights Act*, a civil action, grievance arbitration or accessing supports provided for students. If an alternative proceeding has commenced, the university retains the discretion to suspend the procedures outlined in this policy pending resolution of the alternative proceeding. This discretion must be exercised with regard to the university's obligation to maintain a safe, discrimination-free and harassment-free environment.

48.   If a matter is subject to a criminal investigation or proceeding, the Vice-President, People & Culture may decide to defer any process in this policy until such time as the criminal investigation or proceeding has concluded.

49.   Immediate Measures may be implemented despite a deferral of process under paragraphs 47 or 48.

50.   Despite the initiation of any alternative proceeding to this policy or any process engaged under this policy, the university has an obligation to maintain a safe, discrimination-free and harassment-free environment and to ensure that an investigation appropriate to the circumstances is conducted.   Where a Report is not submitted, a university-initiated Investigation may occur to meet this obligation.

Stage 1: Contacting a Safe Disclosure Officer

51.   A person who believes they have been the subject of, or a witness to, a violation of this policy, should contact a Safe Disclosure Officer. If requested, the Safe Disclosure Officer shall provide advice to the person regarding their options under this policy, which include:

  a.   requesting Immediate Measures and/or accommodations per Stage 2; and/or

  b.   engaging Early Intervention options before Investigation per Stage 3; and/or

  c.   submitting a Report per Stage 4, leading to an Investigation.

52.   If the Respondent is a Safe Disclosure Officer, a member of the Department of Equity, Diversity, Inclusion & Human Rights, and/or the Vice-President, People & Culture, the person has agency to choose to contact any University Administrator.

Stage 2: Immediate Measures and/or Accommodations

53.   Accommodations are reasonable adjustments to one's own living, learning, and working environment to eliminate barriers to one's participation in university life. Examples of accommodations include student residence relocation, class schedule changes, academic accommodations, temporary work location reassignment, and work scheduling changes. If a Reporter requests accommodations, the Safe Disclosure Officer will assist the Reporter in requesting the accommodations pursuant to the relevant university policies and procedures.

54.   Appendix A contains information about the supports and services available at the university to students and Reporters who are affected by Discrimination, Harassment and/or Sexual Harassment and to Respondents under this policy.

55.   Immediate Measures are non-disciplinary conditions that may be imposed upon a Respondent where there are allegations that would, if proven, constitute Discrimination, Harassment, or Sexual Harassment, and the measures are necessary to:

    a. maintain the safety security, or academic, residence, or employment well-being of any member of the university community;

    b. preserve the confidentiality and integrity of this policy and its processes;

    c. discourage or prevent retaliation or other disruption to, or interference with, the operations of the university or activities of members of the university community.

    Immediate Measures shall be reasonable and justifiable having regard to the interests of the Respondent and the purpose of the Immediate Measures.

56.   The Department of Equity, Diversity, Inclusion & Human Rights, in consultation with Human Resources or other appropriate University Administrator, may recommend to the appropriate Vice-President that Immediate Measures be implemented at any time prior to, or following, the submission of a Report or initiation of an Investigation.

57.   The recommendation for Immediate Measures shall consider:

    a. the wishes and expressed needs of the Reporter, if any;

    b. the impact of the proposed measures on the Respondent, and views of the Respondent, if available;

    c. the nature and seriousness of the alleged conduct and its impact on the Reporter and/or university community; and

     d.   compliance with any applicable collective agreement or contract of employment.

58.   Options for Immediate Measures may include, but are not limited to, one or more of the following:

     a.   temporary administrative (non-disciplinary) leave without loss of pay;

     b.   temporary removal of employment duties, without loss of pay;

     c.   temporary removal or transfer of a person;

     d.   changes to class schedules or living arrangements;

     e.   the cancellation or rescheduling of an event;

     f.   the issuance of a notice or communication to individuals or groups;

     g.   no contact agreements;

     h.   restrictions on attendance on campus, or parts of campus;

     i.   restrictions on participation in university-affiliated activities or other campus privileges;

    but shall not include, prior to an Investigation, sanctions, impeding progress in an academic or research program, or disciplinary action of any individual for an alleged violation of this policy.

59.   The Department of Equity, Diversity, Inclusion & Human Rights will give written notice to the Respondent of any Immediate Measures being imposed as soon as possible and normally no later than 24 hours after the decision being made. The Reporter shall be provided with information about the terms of Immediate Measures that impact the Reporter.

60.   A person subject to Immediate Measures may challenge them by submitting a written request for reconsideration to the appropriate Vice-President within ten (10) calendar days of their imposition, or within ten (10) calendar days of any material change in circumstances. The Vice-President will deliver a written decision on the request. Where the person upon whom Immediate Measures have been imposed is a unionized employee, the employee may take steps under the provisions of the applicable collective agreement. Immediate Measures will remain in effect during any period of request for reconsideration.

61.   Immediate Measures may remain in place indefinitely where:

     a.   No formal Report has been made and no investigation initiated;

     b.   The Immediate Measures meet the needs of the Reporter and that person consents;

    c. The Respondent consents to the continuation of the Immediate Measures; and

    d. The Immediate Measures address the safety, remedial, and other responsibilities of the university.

Stage 3: Early Intervention Before Investigation

62. Early Intervention options are voluntary, requiring the informed consent of the person engaging such options. They could include a variety of interventions appropriate to the circumstances and the person's needs, for instance:

    i. seeking assistance from a trusted friend, colleague, union representative, supervisor, Department Chair, a university administrator, human resources, the Department of Equity, Diversity, Inclusion & Human Rights;

    ii. addressing the matter directly with the individual or Office that the person believes is responsible for the violation of this policy;

    iii. with the consent of the individual(s) alleged to have violated this policy, entering into a third party facilitated discussion or mediation, or other culturally appropriate dispute resolution process.

63. Early Intervention options will be coordinated by the Department of Equity, Diversity, Inclusion & Human Rights. The normal timeline for completion is 4-6 weeks.

Stage 4: Submitting a Report

64. A person who believes they have been the subject of, or a witness to, a violation of this policy may:

    a. submit a Report directly with a Safe Disclosure Officer; or

    b. give their consent to a Surrogate to submit a Report on their behalf, anonymously or non-anonymously.

65. An anonymous Report through a Surrogate does not supersede the Respondent's right to procedural fairness and therefore may impact the potential outcomes available following an Investigation.

66. If the Respondent is the Department of Equity, Diversity, Inclusion & Human Rights, a member of that Department, and/or the Vice-President, People & Culture, the Reporter may submit the Report directly to the President.

67. If the Respondent is the President, the Reporter may submit the Report directly to the Chair of the Board of Governors.

68. If the Respondent is a member of the Board of Governors, the Reporter may submit the report directly to the Chair of the Board of Governors.

69. If the Respondent is the Chair of the Board of Governors, the Reporter may submit the Report directly to the Vice-Chair of the Board of Governors or, via the University Secretary, the Board of Governors.

70. The Department of Equity, Diversity, Inclusion & Human Rights will undertake an initial assessment of the Report to determine whether:

    a. it is within the Scope and Application of this policy; and

    b. the alleged facts, if proven, could amount to Discrimination, Harassment or Sexual Harassment; and

    c. either of the Reporter or Respondent is identifiable; and

    d. the matter is not more appropriately addressed through the Sexual Violence Policy or another university policy;

    in which case, the Report will be considered to be accepted for Investigation.

71. The following factors will not be considered in assessing whether a Report is accepted for Investigation:

    a. it is or will be inconvenient;

    b. it will negatively impact the reputation of the university;

    c. it will be costly to investigate and/or to remedy;

    d. the Respondent is unavailable (for whatever reason);

    e. the Reporter has left the university.

72. If the Report is not accepted for Investigation, the Department of Equity, Diversity, Inclusion & Human Rights will notify the Reporter in writing, identifying why the Report was not accepted for Investigation, and the process by which the Reporter may request a reconsideration of the determination. If new information is subsequently provided, this decision may be re-evaluated.

73. A decision not to accept a Report for Investigation does not preclude the availability of accommodations or other supports and services for affected members of the university community.

74.   If the Report is submitted to the President, Chair of the Board of Governors, Vice-Chair of the Board of Governors, or the Board of Governors, the obligations of the Department of Equity, Diversity, Inclusion & Human Rights under this Stage 4 shall be assumed by that person/entity who may seek external advice and/or delegate their authority to an external expert or consultant.

Stage 5: Investigation

75.   An Investigation will be initiated:

   a.   on acceptance of a Report for Investigation by the Department of Equity, Diversity, Inclusion & Human Rights;

   b.   in the absence of a Report, by the university to address circumstances where a University Administrator is aware of the possible occurrence of Discrimination, Harassment or Sexual Harassment.

76.   The Reporter has agency to choose not to participate in an Investigation but that does not supersede the Respondent's right to procedural fairness and therefore may impact the potential outcomes available following an Investigation.

77.   The Investigator shall be an external third party selected by the Department of Equity, Diversity, Inclusion & Human Rights from among a pre-established list of investigators. The list shall consist of professionals with previous experience in conducting harassment, discrimination and/or sexual violence investigations at universities or institutions of similar size or complexity. To the extent possible, the list shall have broad representation across Protected Grounds.

78.   Prior to the selection of the Investigator, the Reporter and Respondent will be asked to identify any investigator on the list that, if selected, would present for them an actual or perceived Conflict of Interest.

79.   The selection shall be made considering the Investigator's capacity to complete an Investigation in a timely manner, their particular expertise relative to the circumstances of the matter at hand, and whether or not there is an actual or perceived Conflict of Interest concerning the Reporter or Respondent. If necessary, the selection of an external third party Investigator may be made outside the list where required to meet the criteria set out above.

80.   If the Reporter or Respondent is of the view that the selected Investigator presents an actual or perceived Conflict of Interest, they may request that an alternative Investigator be selected. The request shall be made within 3 business days of having been notified of the initial selection. After considering any request, the decision of the Department of Equity, Diversity, Inclusion & Human Rights regarding the selection of Investigator shall be final.

81.   The Investigator shall be tasked with producing an Investigation Outcome, following the principles of procedural fairness, supported by evidence in the form of written submission and/or separate interviews by the Investigator (not in-person hearings) and using the standard of balance of probabilities, containing:

       a. a statement of the process followed;

       b. findings of fact;

       c. a determination of whether there has been a violation of this policy;

       d. reasons for the determination;

       e. where there is a determination of a violation, recommended remedial and/or corrective action(s).

82.   The timeline for completion of an Investigation Outcome is highly dependent on the complexity of the matter, the volume of evidence and number of witnesses and other circumstantial matters as they may arise.   The normal timeline for completion is 1-3 months.

83.   Upon completion, the Investigation Outcome shall be provided to the appropriate Vice-President.

84.   A university-initiated Investigation will be processed and responded to by the university in the same manner as a Report, except that the Reporter shall be the relevant University Administrator.

Stage 6: Actions following an Investigation Outcome

85.   Within 5 business days of receipt of the Investigation Outcome, the appropriate Vice President shall notify the Reporter and Respondent of the result, and shall provide a copy of the Investigation Outcome, redacted where required by law.

86.   Where the Investigator has made a determination that there has been a violation of this policy, the appropriate Vice-President shall initiate remedial and/or corrective actions as they deem appropriate, in consideration of the recommendations contained in the Investigation Outcome. Remedial and/or corrective actions shall be initiated within 7 business days of providing the Investigation Outcome to the Respondent.

87.   The appropriate Vice-President shall notify the Reporter and Respondent of all remedial and/or corrective actions initiated.

88.   Any remedial and/or corrective action shall be subject to university policies and/or collective agreements, as may be applicable.

89. Remedial and/or corrective actions shall recognize the harm to the Reporter and others, taking into account the seriousness of the violation, and any mitigating or aggravating factors. The goal of remedial and/or corrective action shall be to:

   a. enhance a culture of trust, safety and inclusion at the university and among members of the university community;

   b. enhance accountability and transparency at the university;

   c. remove any ongoing violations of this policy;

   d. prevent future violations of this policy by the Respondent and others;

   but shall not take into account:

   e. the extent to which the remedial action is inconvenient, will negatively impact the reputation of the university, or will be costly to implement;

   f. that the Respondent has left the university, except that any disciplinary action of the Respondent since-departed would be foreclosed;

   g. the potential for appeal under this policy or any alternatively available appeal or review.

90. Remedial and/or corrective actions may include, but are not limited to:

   a. those actions contemplated as Immediate Measures;

   b. education and training;

   c. workplace or academic accommodation;

   d. resident relocation or suspension;

   e. probation;

   f. discipline, up to and including termination;

   g. suspension or expulsion.

Stage 7: Appeal

91. Subject to paragraph 93, the Reporter or Respondent may appeal the outcome and/or remedial/corrective action on one or more of the following grounds:

   a. there was a fundamental procedural error seriously prejudicial to the appellant;

   b. there is new relevant evidence that could not have been reasonably presented earlier.

92.   An Appeal is not a rehearing of the evidence.

93.   An Appeal shall be filed with the Department of Equity, Diversity, Inclusion & Human Rights within 15 business days of the appellant's receipt of the Investigation Outcome or decision on remedial and/or corrective action from the appropriate Vice-President, whichever is later.

94.   An Appeal shall be heard by an appeal committee consisting of three members. Two members shall be selected from a pre-established roster of members of the university community having appropriate training and qualifications with respect to human rights principles, procedural fairness, and trauma-informed approaches. One member shall be selected from the roster by the Reporter, and one member selected from the roster by the Respondent. The third member shall be selected by the university who shall be an external lawyer, other than the university's regular counsel and subject to the Conflict of Interest policy, and who has expertise in human rights and administrative law.

95.   The Appeal will be heard in writing except where the appeal committee decides that an oral hearing will be afforded, e.g. for the most severe penalties such as expulsion, or dismissal.

96.   The other party to the Report will be given notice of any Appeal and will be entitled to make submissions, should they wish to participate.

97.   The decision of the appeal committee shall be a decision of the majority, and shall be final and binding. Written reasons for the decision will be communicated to the parties.

98.   Individuals with access to grievance rights under a collective agreement may not file an Appeal under this policy.

I.   Administrative Provisions

99.   This policy shall come into force on a date to be determined by the Board of Governors. On this date the Fair Treatment Policy shall be retired except that matters having commenced under the processes of the Fair Treatment Policy shall continue under that policy until resolved or concluded.

100.   This policy shall be reviewed by the Board of Governors one year following its effective date, and biennially thereafter. The review shall occur in consultation with representatives of the university's elected student governing bodies, and consider input from a diverse selection of students, including those most vulnerable.

101.   The Department of Equity, Diversity, Inclusion, and Human Rights shall produce an annual report on aggregated matters relating to this policy, as may be directed by the Vice-President, People & Culture.

102.   Related university policies include:

    a. Sexual Violence Policy

    b. Academic Accommodations for Students with Disabilities

    c. Violence Prevention and Response; Ensuring a Safe Campus Community

    d. Health, Safety, and Environment Policy

    e. Student Code of Conduct

    f. Conflict of Interest

103. Related statutes include:

    a. Employment Standards Act

    b. Human Rights Act

    c. Freedom of Information and Protection of Privacy Act

    d. Occupational Health and Safety Act including the Occupational Health and Safety Act Workplace Harassment Regulations

    e. Non-disclosure Agreements Act

J. Glossary of Terms

104. Terms appearing in this policy shall have the meanings as set out below (presented in alphabetical order):

    a. Bullying: means repeated, unreasonable behavior directed towards a member of the university community that can cause humiliation or intimidation.

    b. Conflict of Interest: has the meaning set out in the university's Conflict of Interest policy.

    c. vacant

    d. Discrimination: refers to a distinction, whether intentional or not but based on personal characteristics of the individual or group, which has the effect of imposing burdens, obligations, or disadvantages on such individual or group not imposed upon others, or which withholds or limits access to opportunities, benefits, and advantages available to other members of society.

    e. Harassment means any inappropriate conduct, comment, display, action or gesture or any bullying that the person responsible for the conduct, comment, display, action or gesture or the bullying knows, or ought reasonably to know, could have

a harmful effect on the psychological or physical health or safety of a member of the university community, and includes (not an exhaustive list):

i) conduct that is based on any personal characteristic or Protected Ground;

ii) inappropriate sexual conduct that is known, or ought reasonably to be known, to the person responsible for the conduct to be unwelcome, including, but not limited to, sexual solicitations or advances, sexually suggestive remarks, jokes or gestures, circulating or sharing inappropriate images, or unwanted physical contact;

iii) stalking, including cyber-stalking.

Harassment may arise from the accumulation of repeated inappropriate conduct, comments, displays, actions or gestures or incidents of bullying, or from a single occurrence of sufficient severity, assessed on an objective standard.

For greater clarity, reasonable, non-discriminatory actions related to the management, direction, evaluation, grading, supervision, or discipline of members of the university community in the normal course of work and study do not constitute harassment.

f. Investigator: means the individual selected to conduct an Investigation under this policy.

g. member of the university community: means alumni, contractors, employees (faculty, including Department Chairs, Coordinators and Directors, and staff), members of the Board of Governors, students, union employees, union representatives, University Administrators, visitors.

h. this policy: means the University of Prince Edward Island Harassment and Discrimination Policy.

i. Poisoned Environment: Discrimination, Harassment and Sexual Harassment may result in a poisoned work or study environment; in which insulting or degrading comments, actions or microaggressions cause individuals or groups to feel that the environment is hostile or unwelcoming. When comments or conduct of this kind have an influence on others and how they are treated, this is known as a poisoned environment. The essential feature of a poisoned environment is that it is experienced by or impacts on more than just one individual such that it can be considered a practice. (source: Canadian Human Rights Commission)

j. Protected Ground means (listed alphabetically): age, ancestry or place of origin, colour, creed, disability, ethnic or national origin, family status, gender expression, gender identity, marital status, nationality, physical size or weight, political belief, pregnancy, race, religion, romantic orientation, sex, sexual orientation, or source of income of any individual or class of individuals, and any other grounds or personal characteristics protected under the *Human Rights Act* or the *Workplace Harassment Regulations.*

k. Report: means a written disclosure submitted to a Safe Disclosure Officer (or otherwise pursuant to Stage 4) alleging a violation of this policy. A Report may be submitted by someone who believes they are a witness to a violation of this policy, but not the subject of that violation.

l. Reporter: means a member of the university community:

   i. who is the subject of an alleged violation of this policy and who submits a Report under this policy; or

   ii. is one of a group of people who are the subject of the same alleged violation of this policy, for which a Report has been submitted under this policy with the consent of everyone in the group.

m. Respondent: means the person or university Office identified in a Report who is alleged to have violated this policy. It is understood that the use of the singular Respondent does not preclude the possibility of multiple Respondents in context.

n. Sexual Harassment: means any conduct, comment, gesture or contact of a sexual nature (a) that is likely to cause offence or humiliation to a member of the university community; or (b) that might, on reasonable grounds, be perceived by that member of the university community as placing a condition of a sexual nature on their role at the university, including, for example, as a student, or employee or in their participation in university activities.

o. vacant

p. Surrogate: means a person who, on behalf of a Reporter and with their consent, submits a Report under this policy, and may include a supervisor, a University Administrator, or a union representative.

q. Systemic Discrimination: is discrimination inherent in, or the result of, attitudes, patterns of behaviour, informal or formal policies, practices, or procedures, that are part of the social or administrative structures of the university, and that create or perpetuate a position of relative disadvantage for people with a personal characteristic identified by a Protected Ground.

r. University Administrator means: the President, a Vice-President, the Chief Information Officer, the Director of Human Resources, the Chief of Staff, a Dean, the University Librarian.

s. good faith: in the context of making a disclosure or submitting a Report, means the genuine belief by the Reporter that the disclosure or Report is accurate and with merit. Good faith does not cease to exist if a disclosure or Report made with a genuine belief is ultimately found to be inaccurate or without merit.

Appendix A

Supports and services available at the university to Reporters and students who are affected by Discrimination, Harassment and/or Sexual Harassment, and to Respondents under this policy, include:

[list to be maintained and updated on *Department of Equity, Diversity Inclusion and Human Rights* website]

- Department of Equity, Diversity Inclusion and Human Rights
- Mawi'omi Indigenous Student Centre
- Student Affairs and the Webster Centre for Student Success
- Accessibility Services
- International Student Office
- PEI Human Rights Commission
- Emergency Response (call 911)
- UPEI Security Services (call 902-566-0384)

University of Prince Edward Island	Policy No. TBA		Revision No. 0
Policy Title: Sexual Violence Policy			Page 1 of 21
Creation Date: TBA	Version Date: __TBA		Review Date: TBA
Policy Approval Authority: Board of Governors	Designated Executive Officer: Vice-President People and Culture		WWW Access: Yes

A. Preamble

1. This policy has been developed by and for our university community. It is rooted in the right and responsibility we all share to a culture of trust, safety and inclusion in our teaching, learning, research, work and all that we do at the university. We all have a role to play in building that culture; our community thrives when we treat each other with respect and value each other's contributions.

2. The university has the ethical and legal responsibility to maintain an environment free of Sexual Violence. That responsibility includes awareness of what constitutes Sexual Violence, delivering proactive education, ensuring supervisors are monitoring the environment in their area(s) and are knowledgeable of reporting procedures, and responding to Sexual Violence in a timely and effective manner.

3. This policy protects against the 'silencing' of those who make a report of Sexual Violence. The use of non-disclosure agreements shall be prohibited except where they may be the expressed wish and preference of the person making a Report, in accordance with the university's policy. Reprisal and threats of reprisal are prohibited.

4. This policy protects the agency of the person making a Report. A person may choose to make an anonymous Report or choose to not participate in an Investigation but those choices do not supersede the right to procedural fairness for all participants and therefore may impact the process and potential outcomes available following an Investigation.

5. The processes for addressing a concern and/or making a Report are set out in stages to assist with setting out a clear and accessible process, not to imply that the stages are always sequential or that any given stage is a requirement.

6. While those who have been the subject of a violation of this policy generally have the right to choose the process and at what stage a violation is addressed, nothing in this policy precludes the right of the university to take action as may be necessary to meet its ethical and legal responsibility, and this may include initiating an Investigation.

B. Purpose

7. The purpose of this policy is to provide a mechanism for the prevention of Sexual Violence at the university and, in the conduct of university business, a process to investigate and address reports of Sexual Violence. Its purpose is also to raise awareness

of Sexual Violence, including implementing mandatory training, and to address issues relating to consent and power imbalances.

8.   This policy satisfies the university's legal obligations to implement a written policy to prevent and investigate Sexual Violence in the workplace, among other obligations, consistent with the requirements of applicable legislation, namely the: *Post-secondary Institutions Sexual Violence Policies Act* (the *"Act"*) and the accompanying regulations to the *Act* (the *"Regulations"*).

C.   Principles of Application (listed alphabetically)

9.   vacant

10.   Confidentiality: the university recognizes the importance of confidentiality for everyone involved in an allegation of Sexual Violence. The university will make every reasonable effort to balance confidentiality with its legal responsibility to provide a work and study environment free from Sexual Violence.

11.   Conflicts of Interest: this policy recognizes that conflicts of interests may arise at various points in its processes; these will be defined and addressed in accordance with the university's Conflict of Interest policy and the principles of procedural fairness.

12.   Cumulative Impact: It is important for the university to track trends and cumulative incidents that contribute to risk of violations of this policy so that proactive measures may be taken.

13.   Freedom from reprisal: members of the university community have a right to participate in proceedings under this policy without fear of reprisal or retribution.

14.   vacant

15.   Individual support: all Reporters and Respondents, and other participants, may choose to have a support-person present at all steps in the processes of this policy; this may include, for example, a trusted friend, colleague or union representative. The chosen support person should not be a likely witness in any Investigation of the matter.

16.   Power imbalances: Power imbalances exist in organizations that can be exploited or prevent the reporting and management of Sexual Violence. Power imbalances can also obscure or exacerbate proper and improper behaviour and interpersonal relations. The university strives to create policy that respects all members of the university community without deference to power. The university recognizes that one of the purposes of human rights laws and policies is to assist members of groups that have been historically disadvantaged and disempowered in our society.

Romantic or intimate relationships between members of the university community may give rise to Sexual Violence under this policy. *(Also refer to the university's applicable policy related to these relationships - to be developed, and the Conflict of Interest Policy.)*

17. <u>Procedural fairness</u>: Reporters and Respondents have the following procedural fairness protections at every stage or point of decision under this policy: the right to an unbiased decision-maker, notice, the right to be heard, timeliness, and reasons for decisions.

18. <u>Safe disclosure</u>: members of the university community who experience or observe incidents of Sexual Violence have the right to report those incidents in a manner where they feel safe, without fear of reprisal, particularly in circumstances of a power imbalance between individuals.

19. <u>Substituted Authority</u>: where a specific responsibility under this policy falls to a person or Office that is also a participant in a given matter, that responsibility shall be assumed by the person's supervisor or the Office's next level of authority.

20. <u>Timeliness</u>: this policy prescribes timelines for action.   Timelines may be altered by request of a Reporter or Respondent to the Department of Equity, Diversity, Inclusion, and Human Rights or Substituted Authority, as applicable. The university may also alter timelines only where necessary in the following circumstances: to preserve the integrity of this policy and its processes; to ensure procedural fairness; or as may be required by law.

21. <u>Trauma-informed</u>: This policy acknowledges the harm endured by Reporters and survivors along with having awareness of the impacts that trauma has on an individual's emotional, cognitive, physical and sexual wellbeing.[1]

D. Scope and Application

22. This policy applies to all members of the university community with respect to alleged incidents of Sexual Violence that occur, whether on or off campus and through any medium (including electronic):

   a. In the course of university-related programs, operations, or activities;

   b. Using university-owned or run property or equipment;

   c. While participating in university-sponsored or sanctioned activities, events or organizations; or

   d. In the context of non-university activities where the conduct has a material negative impact on a member of the university community's living, learning and/or working environment and in a context where the conduct has a substantial connection to the university.

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[1] (source: Eerkes, D., De Costa, B. & Jafry, Z. (2021). A Comprehensive Guide to Campus Gender-Based Violence Complaints: Strategies for Procedurally Fair, Trauma-Informed Processes to Reduce Harm. Possibility Seeds' Courage to Act: Addressing and Preventing Gender-Based Violence at Post-Secondary Institutions in Canada, page 18)

23.   When allegations of Sexual Harassment are raised, the Safe Disclosure Officer will consult the Harassment & Discrimination Policy to determine which policy best applies to the matter. Allegations of Sexual Harassment will normally proceed under the Sexual Violence Policy unless the matter also includes allegations of Discrimination and Harassment falling within the scope of the Harassment & Discrimination Policy. Allegations of Sexual Harassment must proceed under either the Harassment & Discrimination Policy or this policy, not both, and a party is not permitted, after exhausting the processes in one policy, to proceed under the other policy.

E.   Roles and Responsibilities (presented in alphabetical order)

24.   <u>All members of the university community</u>: have the responsibility to generally inform themselves of this policy, attend any mandatory training, and refrain from behaviour that violates this policy.

25.   <u>Board of Governors</u>: has the fiduciary duty to perform the powers of Board laid out in the *University Act* to ensure the success, integrity, financial, and administrative sustainability of the university. Within that broad duty, the Board of Governors has the responsibility to approve this policy, approve periodic renewals of this policy, address allegations of violations of this policy where the Respondent is the President or a member of the Board of Governors.

26.   <u>Department of Equity, Diversity, Inclusion, and Human Rights</u>: reports to the Vice-President, People & Culture and has a communication line directly to the Board of Governors with respect to matters of this policy. The Department is generally responsible for administering this policy, including: establishing and publishing rules, plain-language companion materials, summaries, guidelines and forms in respect of processes under this policy; establishing and delivering training, which may be mandatory or optional, for the university community in the interpretation and application of this policy and the prevention of Sexual Violence; maintaining appropriate records both by incident and cumulative, and maintaining confidentiality over those records, subject to all applicable policies, processes, and laws; aggregate reporting to the Vice-President, People & Culture on matters relating to this policy; and undertaking those responsibilities expressly set out in accordance with this policy.

27.   <u>Faculty and Staff:</u> have the responsibility to generally inform themselves of this policy, attend any mandatory training, and refrain from behaviour that violates this policy.

28.   <u>President</u>: has the responsibility to monitor the effectiveness of this policy and, each year, report to the Board of Governors on its implementation. The Report shall include, at minimum, those items required by the Act, including information relating to the number of incidents, initiatives to raise awareness of the policy and supports. The President also has the responsibility to address allegations of violations of this policy where the Respondent is a member of the Department of Equity, Diversity, Inclusion & Human Rights, and/or the Vice-President, People & Culture.

29. <u>Safe Disclosure Officer</u>: is a member of the Department of Equity, Diversity, Inclusion, and Human Rights and the first point of contact for members of the university community to address questions about this policy, and to assist with engaging the policy. The Safe Disclosure Officer is responsible to coordinate supports and services available at the university to students and Reporters who are affected by Sexual Violence and to Respondents under this policy.

30. <u>Students: </u>have the responsibility to generally inform themselves of this policy, attend any mandatory training, and refrain from behaviour that violates this policy.

31. <u>Supervisory roles</u>: supervisors have the responsibility to generally inform themselves of this policy and are expected to personally uphold the policy at all times, monitor the environment in their area(s), be knowledgeable of reporting procedures and this policy, and to remind those who report Sexual Violence of the options for engaging this policy. Supervisors may have an obligation to report matters brought to their attention directly to the Department of Equity, Diversity, Inclusion & Human Rights.

32. <u>Unions</u>: are advocates for building a culture of safety, trust and inclusion. They build awareness of this policy, and represent and support their members throughout its processes.

33. <u>Vice President, People & Culture</u>: has the responsibility to monitor the effectiveness of this policy and recommend amendments for approval of the Board of Governors, to oversee the effectiveness of the Department of Equity, Diversity, Inclusion & Human Rights, in its administration of this policy, and to report to the President in that regard, as may be directed by the President.

34. <u>Vice-Presidents</u>: Vice Presidents are responsible for approving and implementing any Immediate Measures and/or accommodations, on the recommendation of the Department of Equity, Diversity, Inclusion & Human Rights, and remedial and/or corrective action under Stage 5. (Where this policy references the "appropriate" Vice-President, that means the specific Vice-President within the reporting line of the Reporter or Respondent, as the context requires.)

F.   Statement of Commitment

35. All members of the university community are entitled to a working, studying and living environment free from Sexual Violence as defined by this policy. The University will appropriately accommodate the needs of persons affected by Sexual Violence, relating to work, study, housing, or extra- curricular activities.

36. All members of the university community have a right to participate in processes under this policy without fear of reprisal or retribution.

37. As required by law, the university commits that it will:

    a.   prevent Sexual Violence as far as reasonably practicable;

b. take corrective action to address incidents of Sexual Violence;

c. not reprimand, seek reprisal, or discriminate against a member of the university community who has made a disclosure or Report in good faith;

d. take corrective action against those who reprimand, seek reprisal, or discriminate against a member of the university community who has made a disclosure or Report in good faith;

e. for all members of the university community, provide prevention education activities as well as training on Sexual Violence issues, this policy, and its process for responding to and addressing Sexual Violence.

G. Confidentiality

38.   The university shall not disclose any identifying information about any person involved or the circumstances relating to the complaint to any person unless disclosure is necessary for the purposes administering the procedures of this policy, including investigating the complaint, providing accommodations, or implementing Immediate Measures. In all cases, the least amount of information possible will be shared.

39.   Confidentiality may also be limited in circumstances where a serious safety risk exists or the university has a legal obligation to share information. Examples of these circumstances include:

   a.   where the Department of Equity, Diversity, Inclusion, and Human Rights, in consultation with university administrators as appropriate, has identified a serious and credible risk of harm to a member of the university community or another person;
   b.   where there is a legal duty to report to authorities, such as a duty to report abuse under the Child, Youth and Family Services Act;
   c.   to respond to a subpoena or otherwise where the university has a legal obligation to cooperate in an extra-university judicial process.

40.   In any event, the disclosure of identifying information shall be subject to the university's obligations pursuant to the law, including but not limited to, the *Freedom of Information and Protection of Privacy Act*.

41.   Participants in this policy have a duty to maintain confidentiality as appropriate to preserve the integrity of the policy's processes. Participants may discuss matters in confidence with family, personal, professional or cultural advisors, therapists, union representatives and legal advisors.

42.   All records produced under this policy shall be maintained by the Department of Equity, Diversity, Inclusion, and Human Rights as required and permitted by the law.

43.   The use of non-disclosure agreements is prohibited under this policy except as may be permitted by the *Non-disclosure Agreements Act* and the university's policy.

H. Process and Reporting

44.   This policy sets out a staged process for addressing allegations of Sexual Violence that allows for initiation of process and/or intervention proportionate to the circumstances, reflecting the seriousness of the matter, the level of readiness of the Reporter, and other considerations.

45.   The "Stage" refers to the point of entry into the process. All Stages are not all required.

46.   A person who believes they may have violated this policy is encouraged to proactively disclose the matter to a Safe Disclosure Officer for advice and possible early resolution.

47.   Nothing in this policy prevents a member of the university community from initiating an alternative proceeding, such as a complaint with the PEI Human Rights Commission, in accordance with the *Human Rights Act*, a civil action, grievance arbitration or accessing supports provided for students. If an alternative proceeding has commenced, the university retains the discretion to suspend the procedures outlined in this policy pending resolution of the alternative proceeding. This discretion must be exercised with regard to the university's obligation to maintain an environment free from Sexual Violence.

48.   If a matter is subject to a criminal investigation or proceeding, the Vice-President, People & Culture may decide to defer any process in this policy until such time as the criminal investigation or proceeding has concluded.

49.   Immediate Measures may be implemented despite a deferral of process under paragraphs 47 or 48.

50.   Despite the initiation of any alternative proceeding to this policy or any process engaged under this policy, the university has an obligation to maintain an environment free from Sexual Violence and to ensure that an investigation appropriate to the circumstances is conducted.   Where a Report is not submitted, a university-initiated Investigation may occur to meet this obligation.

Stage 1: Contacting a Safe Disclosure Officer

51.   A person who believes they have been the subject of, or a witness to, a violation of this policy, should contact a Safe Disclosure Officer. If requested, the Safe Disclosure Officer shall provide advice to the person regarding their options under this policy, which include:

   a.   requesting Immediate Measures and/or accommodations per Stage 2; and/or

   b.   engaging Early Intervention options before Investigation per Stage 3; and/or

   c.   submitting a Report per Stage 4, leading to an Investigation.

52.   If the Respondent is a Safe Disclosure Officer, a member of the Department of Equity, Diversity, Inclusion & Human Rights, and/or the Vice-President, People & Culture, the person has agency to choose to contact any University Administrator.

Stage 2: Immediate Measures and/or Accommodations

53.   Accommodations are reasonable adjustments to one's own living, learning, and working environment to eliminate barriers to one's participation in university life. Examples of accommodations include student residence relocation, class schedule changes, academic accommodations, temporary work location reassignment, and work scheduling changes. If a Reporter requests accommodations, the Safe Disclosure Officer will assist the Reporter in requesting the accommodations pursuant to the relevant university policies and procedures.

54.   If a student is affected by Sexual Violence, the univerity will work with that student to determine the appropriate accommodations required based on the student's experiences and expressed needs, which may include, but not limited to, the following academic and non-academic accommodations:

      a.   change in academic supervision;

      b.   timeline to completion for extensions for courses, exams and assignments;

      c.   course section reassignment;

      d.   resident relocation;

      e.   approved leave.

      Additionally, Appendix A contains information about the supports and services available at the university to students and Reporters who are affected by Sexual Violence and to Respondents under this policy.

55.   Immediate Measures are non-disciplinary conditions that may be imposed upon a Respondent where there are allegations that would, if proven, constitute Sexual Violence, and the measures are necessary to:

      a.   maintain the safety security, or academic, residence, or employment well-being of any member of the university community;

      b.   preserve the confidentiality and integrity of this policy and its processes;

      c.   discourage or prevent retaliation or other disruption to, or interference with, the operations of the university or activities of members of the university community.

      Immediate Measures shall be reasonable and justifiable having regard to the interests of the Respondent and the purpose of the Immediate Measures.

56.   The Department of Equity, Diversity, Inclusion & Human Rights, in consultation with Human Resources or other appropriate University Administrator, may recommend to the appropriate Vice-President that Immediate Measures be implemented at any time prior to, or following, the submission of a Report or initiation of an Investigation.

57. The recommendation for Immediate Measures shall consider:

    a. the wishes and expressed needs of the Reporter, if any;

    b. the impact of the proposed measures on the Respondent, and views of the Respondent, if available;

    c. the nature and seriousness of the alleged conduct and its impact on the Reporter and/or university community; and

    d. compliance with any applicable collective agreement or contract of employment.

58. Options for Immediate Measures may include, but are not limited to, one or more of the following:

    a. temporary administrative (non-disciplinary) leave without loss of pay;

    b. temporary removal of employment duties, without loss of pay;

    c. temporary removal or transfer of a person;

    d. changes to class schedules or living arrangements;

    e. the cancellation or rescheduling of an event;

    f. the issuance of a notice or communication to individuals or groups;

    g. no contact agreements;

    h. restrictions on attendance on campus, or parts of campus;

    i. restrictions on participation in university-affiliated activities or other campus privileges;

    but shall <u>not</u> include, prior to an Investigation, sanctions, impeding progress in an academic or research program, or disciplinary action of any individual for an alleged violation of this policy.

59. The Department of Equity, Diversity, Inclusion & Human Rights will give written notice to the Respondent of any Immediate Measures being imposed as soon as possible and normally no later than 24 hours after the decision being made. The Reporter shall be provided with information about the terms of Immediate Measures that impact the Reporter.

60.   A person subject to Immediate Measures may challenge them by submitting a written request for reconsideration to the appropriate Vice-President within ten (10) calendar days of their imposition, or within ten (10) calendar days of any material change in circumstances. The Vice-President will deliver a written decision on the request. Where the person upon whom Immediate Measures have been imposed is a unionized employee, the employee may take steps under the provisions of the applicable collective agreement. Immediate Measures will remain in effect during any period of request for reconsideration..

61.   Immediate Measures may remain in place indefinitely where:

   a.   No formal Report has been made and no investigation initiated;

   b.   The Immediate Measures meet the needs of the Reporter and that person consents;

   c.   The Respondent consents to the continuation of the Immediate Measures; and

   d.   The Immediate Measures address the safety, remedial, and other responsibilities of the university.

Stage 3: Early Intervention Before Investigation

62.   Early Intervention options are voluntary, requiring the informed consent of the person engaging such options. They could include a variety of interventions appropriate to the circumstances and the person's needs, for instance:

   i.   seeking assistance from a trusted friend, colleague, union representative, supervisor, Department Chair, a university administrator, human resources, the Department of Equity, Diversity, Inclusion & Human Rights;

   ii.   addressing the matter directly with the individual or Office that the person believes is responsible for the violation of this policy;

   iii. with the consent of the individual alleged to have violated this policy, entering into a third party facilitated discussion or mediation, or other culturally appropriate dispute resolution process.

63.   Early Intervention options will be coordinated by the Department of Equity, Diversity, Inclusion & Human Rights. The normal timeline for completion is 4-6 weeks.

Stage 4: Submitting a Report

64.   A person who believes they have been the subject of, or a witness to, a violation of this policy may:

   a.   submit a Report directly with a Safe Disclosure Officer; or

      b.   give their consent to a Surrogate to submit a Report on their behalf, anonymously or non-anonymously.

65.   An anonymous Report through a Surrogate does not supersede the Respondent's right to procedural fairness and therefore may impact the potential outcomes available following an Investigation.

66.   If the Respondent is the Department of Equity, Diversity, Inclusion & Human Rights, a member of that Department, and/or the Vice-President, People & Culture, the Reporter may submit the Report directly to the President.

67.   If the Respondent is the President, the Reporter may submit the Report directly to the Chair of the Board of Governors.

68.   If the Respondent is a member of the Board of Governors, the Reporter may submit the report directly to the Chair of the Board of Governors.

69.   If the Respondent is the Chair of the Board of Governors, the Reporter may submit the Report directly to the Vice-Chair of the Board of Governors or, via the University Secretary, the Board of Governors.

70.   The Department of Equity, Diversity, Inclusion & Human Rights will undertake an initial assessment of the Report to determine whether:

      a.   it is within the Scope and Application of this policy; and

      b.   the alleged facts, if proven, could amount to Sexual Violence; and

      c.   either of the Reporter or Respondent is identifiable; and

      d.   the matter is not more appropriately addressed through the Harassment and Discrimination Policy or another university policy;

in which case, the Report will be considered to be accepted for Investigation .

71.   The following factors will not be considered in assessing whether a Report is accepted for Investigation:

      a.   it is or will be inconvenient;

      b.   it will negatively impact the reputation of the university;

      c.   it will be costly to investigate and/or to remedy;

      d.   the Respondent is unavailable (for whatever reason);

      e.   the Reporter has left the university.

72.   If the Report is not accepted for Investigation, the Department of Equity, Diversity, Inclusion & Human Rights will notify the Reporter in writing, identifying why the Report was not accepted for Investigation, and the process by which the Reporter may request a reconsideration of the determination. If new information is subsequently provided, this decision may be re-evaluated.

73.   A decision not to accept a Report for Investigation does not preclude the availability of accommodations or other supports and services for affected members of the university community.

74.   If the Report is submitted to the President, Chair of the Board of Governors, Vice-Chair of the Board of Governors, or the Board of Governors, the obligations of the Department of Equity, Diversity, Inclusion & Human Rights under this Stage 4 shall be assumed by that person/entity who may seek external advice and/or delegate their authority to an external expert or consultant.

Stage 5: Investigation

75.   An Investigation will be initiated:

   a.   on acceptance of a Report for Investigation by the Department of Equity, Diversity, Inclusion & Human Rights;

   b.   in the absence of a Report, by the university to address circumstances where a University Administrator is aware of the possible occurrence of Sexual Violence.

76.   The Reporter has agency to choose not to participate in an Investigation but that does not supersede the Respondent's right to procedural fairness and therefore may impact the potential outcomes available following an Investigation.

77.   The Investigator shall be an external third party selected by the Department of Equity, Diversity, Inclusion & Human Rights from among a pre-established list of investigators. The list shall consist of professionals with previous experience in conducting harassment, discrimination and/or sexual violence investigations at universities or institutions of similar size or complexity. To the extent possible, the list shall have broad representation across protected human rights grounds.

78.   Prior to the selection of the Investigator, the Reporter and Respondent will be asked to identify any investigator on the list that, if selected, would present for them an actual or perceived Conflict of Interest.

79.   The selection shall be made considering the Investigator's capacity to complete an Investigation in a timely manner, their particular expertise relative to the circumstances of the matter at hand, and whether or not there is an actual or perceived Conflict of Interest concerning the Reporter or Respondent. If necessary, the selection of an external third party Investigator may be made outside the list where required to meet the criteria set out above.

80.   If the Reporter or Respondent is of the view that the selected Investigator presents an actual or perceived Conflict of Interest, they may request that an alternative Investigator be selected. The request shall be made within 3 business days of having been notified of the initial selection. After considering any request, the decision of the Department of Equity, Diversity, Inclusion & Human Rights regarding the selection of Investigator shall be final.

81.   The Investigator shall be tasked with producing an Investigation Outcome, following the principles of procedural fairness, supported by evidence in the form of written submission and/or separate interviews by the Investigator (not in-person hearings) and using the standard of balance of probabilities, containing:

    a.   a statement of the process followed;

    b.   findings of fact;

    c.   a determination of whether there is a violation of this policy;

    d.   reasons for the determination;

    e.   where there is a determination of a violation, recommended remedial and/or corrective action(s).

82.   The timeline for completion of an Investigation Outcome is highly dependent on the complexity of the matter, the volume of evidence and number of witnesses and other circumstantial matters as they may arise.   The normal timeline for completion is 1-3 months.

83.   Upon completion, the Investigation Outcome shall be provided to the appropriate Vice-President.

84.   A university-initiated Investigation will be processed and responded to by the university in the same manner as a Report, except that the Reporter shall be the relevant University Administrator.

Stage 6: Actions following an Investigation Outcome

85.   Within 3 business days of receipt of the Investigation Outcome, the appropriate Vice President shall notify the Reporter and Respondent of the result, and shall provide a copy of the Investigation Outcome, redacted where required by law.

86.   Where the Investigator has made a determination that there has been a violation of this policy, the appropriate Vice President shall initiate remedial and/or corrective actions as they deem appropriate, in consideration of the recommendations contained in the Investigation Outcome. Remedial and/or corrective actions shall be initiated within 5-7 business days of providing the Investigation Outcome to the Respondent.

87.   The appropriate Vice-President shall notify the Reporter and Respondent of all remedial and/or corrective actions initiated.

88.   Any remedial and/or corrective action shall be subject to university policies and/or collective agreements, as may be applicable.

89.   Remedial and/or corrective actions shall recognize the harm to the Reporter and others, taking into account the seriousness of the violation, and any mitigating or aggravating factors. The goal of remedial and/or corrective action shall be to:

    a.   enhance a culture of trust, safety and inclusion at the university and among members of the university community;

    b.   enhance accountability and transparency at the university;

    c.   remove any ongoing violations of this policy;

    d.   prevent future violations of this policy by the Respondent and others;

       but shall not take into account:

    e.   the extent to which the remedial action is inconvenient, will negatively impact the reputation of the university, or will be costly to implement;

    f.   that the Respondent has left the university, except that any disciplinary action of the Respondent since-departed would be foreclosed;

    g.   the potential for appeal under this policy or any alternatively available appeal.

90.   Remedial and/or corrective actions may include, but are not limited to:

    a.   those actions contemplated as Immediate Measures;

    b.   education and training;

    c.   workplace or academic accommodation;

    d.   resident relocation or suspension;

    e.   probation;

    f.   discipline, up to and including termination;

    g.   suspension or expulsion.

Stage 7: Appeal

91.   Subject to paragraph 93, the Reporter or Respondent may appeal the outcome and/or remedial/corrective action on one or more of the following grounds:

       a. there was a fundamental procedural error seriously prejudicial to the appellant;

       b. there is new relevant evidence that could not have been reasonably presented earlier.

92. An Appeal is not a rehearing of the evidence.

93. An Appeal shall be filed with the Department of Equity, Diversity, Inclusion & Human Rights within 15 business days of the appellant's receipt of the Investigation Outcome or decision on remedial and/or corrective action from the appropriate Vice-President, whichever is later.

94. An Appeal shall be heard by an appeal committee consisting of three members. Two members shall be selected from a pre-established roster of members of the university community having appropriate training and qualifications with respect to human rights principles, procedural fairness, and trauma-informed approaches. One member shall be selected from the roster by the Reporter, and one member selected from the roster by the Respondent. The third member shall be selected by the university who shall be an external lawyer, other than the university's regular counsel and subject to the Conflict of Interest policy, and who has expertise in human rights and administrative law.

95. The Appeal will be heard in writing except where the appeal committee decides that an oral hearing will be afforded, e.g. for the most severe penalties such as expulsion, or dismissal.

96. The other party to the Report will be given notice of any Appeal and will be entitled to make submissions, should they wish to participate.

97. The decision of the appeal committee shall be a decision of the majority, and shall be final and binding. Written reasons for the decision will be communicated to the parties.

98. Individuals with access to grievance rights under a collective agreement may not file an Appeal under this policy.

I.   Administrative Provisions

99.   This policy shall come into force on a date to be determined by the Board of Governors. On this date the "Sexual Violence Policy (2018)" shall be retired except that matters having commenced under the processes of that policy shall continue under that policy until resolved or concluded.

100.   This policy shall be reviewed by the Board of Governors one year following its effective date, and biennially thereafter. The review shall occur in consultation with representatives of the university's elected student governing bodies, and consider input from a diverse selection of students, including those most vulnerable.

101.   The Department of Equity, Diversity, Inclusion, and Human Rights shall produce an annual report on aggregated matters relating to this policy, as may be directed by the Vice-President, People & Culture.

102.   Related university policies include:

   a. Harassment and Discrimination Policy

   b. Academic Accommodations for Students with Disabilities

   c. Violence Prevention and Response; Ensuring a Safe Campus Community

   d. Health, Safety, and Environment Policy

   e. Student Code of Conduct

   f. Conflict of Interest

103.   Related statutes include:

   a. Employment Standards Act

   b. Human Rights Act

   c. Freedom of Information and Protection of Privacy Act

   d. Occupational Health and Safety Act including the Occupational Health and Safety Act Workplace Harassment Regulations

   e. Non-disclosure Agreements Act

   f. Post-secondary Institutions Sexual Violence Policies Act

J.   Glossary of Terms

104. Terms appearing in this policy shall have the meanings as set out below (presented in alphabetical order):

    a. vacant

    b. Conflict of Interest: has the meaning set out in the university's Conflict of Interest policy.

    c. Consent means: active, ongoing, informed, and voluntary agreement to engage in sexual activity, and to continue to engage in sexual activity. Consent means that all persons involved expressly demonstrate through words or actions that they freely and mutually agree to participate in the sexual activity.

       The following principles apply.

          i. Consent must be obtained at the outset and at all stages of sexual activity on an ongoing basis.

          ii. Consent cannot be implied or assumed from passivity, immobility or an absence of resistance or perceived resistance.

          iii. Silence, or the absence of "no", is not consent.

          iv. Consent cannot be given by someone who is incapacitated, unconscious, intoxicated, or otherwise incapable of consenting. A person's state of intoxication is not a defence to sexual contact without consent.

          v. Past consent earlier in the day or night in question, or on previous occasions, does not imply contemporary, ongoing, or future consent.

          vi. Consent may be withdrawn anytime.

          vii. Consent cannot be given in circumstances where one person abuses a position of trust, power or authority over another person. (see also the Conflict of Interest policy)

          viii. Consent cannot be given in circumstances where there exists a threat, coercion, or other forms of control or intimidation, which includes abuse of a position of trust, power, or authority, fraud, withholding of critical information that could affect a person's decision to give consent.

          ix. A person cannot rely only on their subjectively held (mistaken) belief that another person is communicating consent, but must take active and ongoing reasonable steps to confirm consent.

          x. It is the responsibility of the person who wishes to initiate sexual activity to obtain consent from other persons involved.

      xi.   Consent may be given through different, but clear methods of communication, in circumstances where a person has a condition that limits their verbal or physical means of communication.

      xii.   The definition of consent does not vary based on a person's sex, sexual history, sexual orientation, gender identity, gender expression.

d. vacant

e. vacant

f. Investigator: means the individual selected to conduct an Investigation under this policy.

g. member of the university community: means alumni, contractors, employees (faculty and staff), members of the Board of Governors, students, union employees, union representatives, University Administrators, visitors.

h. this policy: means the University of Prince Edward Island Sexual Violence Policy.

i. vacant

j. vacant

k. Report: means a written disclosure submitted to a Safe Disclosure Officer (or otherwise pursuant to Stage 4) alleging a violation of this policy. A Report may be submitted by someone who believes they are a witness to a violation of this policy, but not the subject of that violation.

l. Reporter: means a member of the university community:

      i.   who is the subject of an alleged violation of this policy and who submits a Report under this policy; or

      ii.   is one of a group of people who are the subject of the same alleged violation of this policy, for which a Report has been submitted under this policy with the consent of everyone in the group.

m. Respondent: means the person identified in a Report who is alleged to have violated this policy. It is understood that the use of the singular Respondent does not preclude the possibility of multiple Respondents in context.

n. Sexual Harassment: means any conduct, comment, gesture or contact of a sexual nature (a) that is likely to cause offence or humiliation to a member of the university community; or (b) that might, on reasonable grounds, be perceived by that member of the university community as placing a condition of a sexual nature on their role at the university, including, for example, as a student, or employee or in their participation in university activities.

o. Sexual Violence: as defined by the Act, means any sexual act or act that targets a person's sexuality, gender identity or gender expression, whether the act is physical or psychological in nature, that is committed, threatened or attempted against a person without the person's consent, and includes, but is not limited to:

    i.   sexual assault

    ii.   Sexual Harassment

    iii.   stalking

    iv.   indecent exposure

    v.   voyeurism

    vi.   sexual exploitation

    vii.   stealthing (the non-consentual or surreptitious removal of a condom); and

    viii.   the distribution of a sexually explicit photograph or video of a person to one or more persons other than the person in the photograph or video without the consent of the person in the photograph or video, that caused distress to the person in the photograph or video.

Additional examples of Sexual Violence could include:

    ix.   the distribution of a sexually explicit photo with likeness or other misinformation;

    x.   hazing;

    xi.   AI generated content.

p. Surrogate: means a person who, on behalf of a Reporter and with their consent, submits a Report under this policy, and may include a supervisor, a University Administrator, or a union representative.

q. vacant

r. University Administrator means: the President, a Vice-President, the Chief Information Officer, the Director of Human Resources, the Chief of Staff, a Dean, the University Librarian.

a. good faith: in the context of making a disclosure or submitting a Report, means the genuine belief by the Reporter that the disclosure or Report is accurate and with merit. Good faith does not cease to exist if a disclosure or Report made with a genuine belief is ultimately found to be inaccurate or without merit.

Appendix A

Supports and services available at the university to Reporters and students who are affected by Sexual Violence, and to Respondents under this policy, include:

[list to be maintained and updated on *Department of Equity, Diversity Inclusion and Human Rights* website]

- Department of Equity, Diversity Inclusion and Human Rights
- Mawi'omi Indigenous Student Centre
- Student Affairs and the Webster Centre for Student Success
- Accessibility Services
- International Student Office
- PEI Human Rights Commission
- Emergency Response (call 911)
- UPEI Security Services (call 902-566-0384)