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Section 1: Institutional Information

Name of Institution

Thompson Rivers University

Please review and update (as needed) your institution's data in the **Institutional Portal**, including:

- Institution Address
- Institution Characteristics
- Key Roles (CEO, CAO, CFO, ALO, Faculty Senate Chair, and Chief Diversity Officer)
- Instructional Sites
- Programs Offered

Does your institution qualify as a Minority Serving Institution (MSI) [\[LINK for information\]](#)

- Yes
- No

Section 2. Higher Education Act

Does your institution use its accreditation or pre-accreditation with the Northwest Commission on Colleges and Universities to establish eligibility to participate in Higher Education Act (HEA) programs, including Title IV funding?

- Yes
- No

Section 3. Articles of Incorporation

Have changes been made in the **Articles of Incorporation and/or Bylaws** since the 2019 Annual Report was filed?

- Yes
 No

Section 4: Institutional Finances

Educational and General Expenditures

Total educational and general expenditures (E&G) and mandatory transfers (exclusive of medical school and hospital budgets, and capital construction expenditures) for the previous academic year. Please provide E & G amount for FY 2019.

207,296,000

Finance Report

For U.S. institutions, please upload a complete copy of the most recent **Audited Financials**.
For Canadian institutions, please upload a copy of the **Consolidated Financial Reports** for 2019.

Audited Financial Statements 2018_19.pdf Upload a different file

Additional Financial Information

Do your Institution's uploaded financial documents include a hospital?

- Yes
- No

If the current institutional expenses do not match the Educational and General Expenditures (E & G) of the most recently submitted IPEDS Finance Survey (U.S. institutions only), or, the uploaded Audited Financials (U.S.) and uploaded Consolidated Financial Reports (Canadian), please provide an explanation here.

Online Program Management (OPM) Contracts

Does your institution have a contract with an Online Program Management company to develop online education?

- Yes
- No

Section 5: Student Rates

Cohort Default Rate

Please upload your institution's Cohort Default Rate history list from the USDE's National Student Loan Data System (NSLDS) website.

No file chosen

Please Note:

- *This does require the use of your institution's FSA ID to access this data.*
- *This request excludes Canadian and Tribal Institutions.*

For US institutions, Student Graduation and Retention Rate information is available to NWCCU via IPEDS. Only Canadian institutions need to provide student rate data directly. US institutions can continue to the next page.

Is your institution located in Canada?

- Yes
 No

Graduation Rate: Two-Year Institutions ONLY

Graduation Rate of full-time, first-time degree/certificate-seeking undergraduates within 150% of normal time to program completion

	Cohort Year (YYYY) *	Graduation Rate **
150% of Normal Time	<input type="text"/>	<input type="text"/>
200% of Normal Time	<input type="text"/>	<input type="text"/>

* Enter most recent cohort year
** Enter rates without percent sign (i.e. 15.2% = 15.2)

Graduation Rate: Four-Year Institutions ONLY

Graduation Rate of full-time, first-time degree/certificate-seeking undergraduates within 150% of normal time to program completion

	Cohort Year (YYYY) *	Graduation Rate **
Four-Year Institutions	<input type="text" value="2012"/>	<input type="text" value="35"/>

* Enter most recent cohort year
** Enter rates without percent sign (i.e. 15.2% = 15.2)

Retention Rates

	Cohort Year (YYYY) *	Full-Time **	Part-Time **
Retention Rates	<input type="text" value="2018"/>	<input type="text" value="79"/>	<input type="text" value="55"/>

* Enter most recent cohort year
** Enter rates without percent sign (i.e. 78.7% = 78.7)

Transfer-Out Rate

	Cohort Year (YYYY) *	First-Time, Full-Time **
Transfer-Out Rate	<input type="text"/>	<input type="text"/>

* Enter most recent cohort year
** Enter rates without percent sign (i.e. 78.7% = 78.7)

Section 7: Significant Enrollment Changes

Note: [NWCCU Policy on Significant Growth](#)

Has your institution experienced enrollment *growth* of 50% or more over the last two years?

- Yes
 No

Has your institution experienced enrollment *decline* of 20% or more since 2016?

- Yes
 No

Note: Your list of academic programs added via the *Institutional Portal* should indicate all academic programs that are experiencing significant growth or significant declines in enrollment.

Section 8. Institutional Reflection

There are a number of sources of information about your institution:

- IPEDS
- NWCCU Institutional Portal, Institutional Profile
- Information on this form

The information we have is a start at describing your institutions goals, challenges, and accomplishments. Please provide any information that would **help us better interpret the information** listed above as it applies to your institution.

TRU's definition of 'student success' is broader than simplistic metrics. TRU acknowledges that 'success' for our students comes in many forms and is not adequately captured by retention and graduation rates alone. Our students' and communities' needs are as diverse as the comprehensive programming we offer. TRU has a unique student demographic: over 10% of students are Indigenous from a variety of nations, 38% join us from more than 100 countries around the globe, and 32% are mature (over 25 years of age) learners.

TRU strives to make post-secondary education available at a time and place and through delivery methods convenient to the learner. Through its legislative mandate, TRU Open Learning (OL) provides open, accessible and flexible learning, and recognition of all types of learning, to students. Built on the fundamental pillars of access to education and recognition of university-level learning obtained regardless of source, OL's open mandate means all types of learners have a real opportunity to successfully complete their education and grow their careers in the most efficient and effective manner possible. Furthermore, of the 24,607 students who study at TRU, 61% are OL students. In addition, 1,517 students are dually enrolled in both campus and OL courses.

This is why it is important for us to look beyond the numbers, and we appreciate the opportunity to share with you the context for student success at TRU.

Support Lasting Reconciliation with Indigenous Peoples

TRU is mandated by the BC Ministry of Advanced Education, Skills & Training (AEST) to increase Indigenous student success "through initiatives that increase the participation and success of Indigenous learners and [through the] implementation of the education-related Calls to Action of the Truth and Reconciliation Commission" (TRU Mandate Letter, 2020).

TRU remains committed to continued progress on the implementation of the Truth and Reconciliation Commission's Calls to Action and the articles of United Nations Declaration on the Rights of Indigenous Peoples (UNDRIP), specifically, by eliminating achievement gaps for Indigenous learners. Below are two examples of how TRU is supporting Indigenous learners:

1. *Knowledge Makers*

Knowledge Makers is a collaborative teaching initiative where Indigenous students engage in experiential learning about research and the mechanisms in publishing research, as Indigenous researchers. We bring together up to 15 Indigenous undergraduate students each year from across the university to learn how to 'make knowledge' through a multi-modal approach. These efforts won TRU the [Alan Blizzard National Teaching Excellence Award in 2019](#).

2. *Coyote Project*

The project involves all TRU faculties and schools, TRU World, Open Learning, and the Library. It is a five-year initiative aimed at accelerating indigenization throughout the curriculum, and includes:

- providing sufficient funding to close identified educational achievement gaps within one generation;

- improving education attainment levels and success rates;
- developing culturally appropriate curricula; and,
- protecting the right to Indigenous languages, including the teaching of Indigenous languages as credit courses.

TRU's commitment to this project is evidenced by the provision of \$12,400 for International Mother Language Day and \$674,622 over three years for *Coyote Project Phase II*.

Increase Participation and Student Success

TRU is mandated by AEST to “contribute to an accessible and relevant post-secondary system by implementing initiatives to increase participation and success of students, including vulnerable and underrepresented groups, and promoting gender parity” (TRU Mandate Letter, 2020).

TRU is embarking on a strategic enrolment management (SEM) plan. SEM planning requires actively engaging with students, faculty, staff, and the communities we serve, to better understand what TRU students need, year-over-year, to succeed. Ultimately, it will result in actionable SEM recommendations customized to who we are and whom and how we serve, as an open access institution.

Student feedback is key to TRU's planning and operations. Information about the satisfaction and experience of our students is continuously gathered through internal, provincial, and national surveys. The feedback continues to reflect a high degree of satisfaction with the institution. Below are two examples of how student feedback has informed organizational change:

1. High Impact Practices

Results from the 2017 NSSE show that, as expected, more fourth-year TRU respondents (84%) reported participating in High Impact Practices (HIPs) compared to first-year TRU respondents (48%). Research has shown that HIPs taken early on in a student's program lead to increased persistence and retention due to a greater sense of belonging and engagement, and increased GPA. That is why TRU's general education model was purposefully designed to include a mandatory HIP course. Students are encouraged to take the HIP course during the first two years of study.

2. Focus on First Year

Survey feedback highlighted ‘students’ sense of belonging’ as an area in need of improvement. As such, TRU has embarked on a strategic initiative, *Focus on First Year*, to build learning communities with faculty teaching first year, to better support first-year students.

Foster an Inclusive and Diverse Learning Environment

TRU is mandated by AEST to work with the Ministry “to implement a student-centred international education framework that supports the success of domestic and international students” (TRU Mandate Letter, 2020).

TRU recognizes the value of international education, culturally and economically. The university continues to strive for diversification and is committed to working closely with AEST and responding to the ministry's call for participation to develop a balanced approach to international education. TRU continues to be at the forefront of international education and supports the development and implementation of a provincial framework. Below are two examples of how TRU is fostering inclusivity by building intercultural awareness and supporting the individual needs of International students:

1. Local-to-Global

The theme Local-to-Global is a fundamental part of TRU's general education model and incorporates the institutional learning outcomes (ILO) Intercultural Awareness and Indigenous Knowledges & Ways. Beginning in Fall 2021, all incoming first year baccalaureate degree students will be required to take a course that meets the criteria for each of the ILOs in order to graduate. Furthermore, TRU's commitment to fostering diverse learning environments is evidenced by the provision of \$150,000 over three years for student mobility programs.

2. International Student Support Services

International students are supported by International Admissions, International Student Advisors (ISA), and International Academic Advising. Admissions officers ensure timely and professional admissions processing and registration assistance. ISAs provide personal counseling both before arrival in Canada and during their program. International Academic Advisors provide program planning, registration, and study skills. In addition, TRU offers the Leisure Exploration Activity Program (LEAP) throughout the year, which provides international students with opportunities to meet students from other countries and explore Kamloops and the region by participating in Canadian activities such as snowboarding, skiing, wine tours, whitewater rafting, and hockey games.

Advance Flexible Online Learning and Open Learning Resources

TRU is mandated by AEST to “develop and recognize flexible learning pathways for students to access post-secondary education and skills training including: supporting lifelong learning pathways across the public post-secondary systems; and, advancing and supporting open learning resources” (TRU Mandate Letter, 2020).

TRU is actively engaged with making life more affordable for students, as well as making online education more accessible around the world—a resource that is more important than ever since the COVID-19 pandemic has shuttered classrooms, and one that more institutions are considering as education moves to alternate modes and away from solely face to face instruction. Below are two examples of how TRU is advancing flexible and affordable learning:

1. Open Educational Resources Development Grant (OERDG) Program

The OERDG program provides funding and staff support to faculty members who wish to integrate open educational resources into their TRU courses. This direct support can be used by faculty to adopt, adapt, create, and/or integrate Open Education Resources (OER) as primary materials within their TRU courses.

2. International Credential Transfer

In an effort to provide access to education, TRU is the first university in North America to assess and provide academic credit for an international credential based on free online open education learning. TRU is a member of the [Open Education Resource universitas \(OERu\)](#), which is a non-profit network of post-secondary institutions from five continents united in making education affordable and accessible through open educational resources. The OERu does not grant credit, rather it is a consortium arrangement of universities that share open sourced courses that students can take for free. Students who want academic credit must pay for assessment fees at either TRU or Otago Polytechnic in New Zealand. TRU has two mechanisms for assuring academic quality of these courses: 1) TRU courses that are part of the OERu are handled by TRU's prior learning assessment and recognition (PLAR) challenge exams; and, 2) the remaining courses follow TRU's regular transfer credit process via an articulation agreement with Otago.

As you can see, 'student success' for TRU means *accessible, inclusive, participatory, sense of belonging, diversity, flexible, and affordable*.

Section 9. Progress on Outstanding Recommendations

Please provide a brief statement on progress on each outstanding Recommendation that is being addressed by your institution.

Recommendation 1. Continue improvement of indicators and thresholds to better align assessment of those parameters with Core Themes and the mission of TRU (Standard 1.B.2).

New Vision, Values, and Strategic Change Goals

In the spring of 2020, TRU's governing bodies approved a new [Vision Statement](#) — including Vision, Values, and Strategic Change Goals. The Vision Statement was the result of 12 months of extensive consultation. The Vision Statement will inform how we interact with those we serve, and how we plan to make significant and meaningful change over the next 10 years at TRU. Four Strategic Change Goals were identified:

- Eliminate achievement gaps
- Honour truth, reconciliation and rights
- Lead in community research and scholarship
- Design lifelong learning

Beginning in Fall 2020, the Provost and Vice President Academic and Research will lead the development of TRU's first Integrated Plan. The Integrated Plan will follow from our vision, values, and strategic goals to define three- to five-year academic projects and priorities, which will be supported by services, facilities planning, personnel complements, and budget allocations.

Mission Fulfilment Planning and Evaluation

TRU continues to build upon its mission fulfilment planning and evaluation process. The process is embedded within TRU's governance structure which mandates relevant standing committees of Senate to report on mission fulfillment in relation to their designated core theme. The committees are supported by the Office of Quality Assurance and Integrated Planning & Effectiveness.

Four initiatives were launched to educate committee members so that they have the knowledge and tools to improve the indicators and better align assessment with TRU's mission.

1. Core Theme Planning Workshop

In December 2019, all Senate standing committee members responsible for core theme planning and evaluation were invited to participate in a half-day workshop. The intent of the workshop was to achieve the following outcomes:

Senate committee members will be able to...

- 1) Describe their roles and responsibilities in the annual core theme assessment, evaluation, and planning process
- 2) Describe the relationship between:
 - a. core theme planning and mission fulfilment
 - b. core themes and strategic priorities
 - c. core theme, institution-wide, campus-wide, and divisional planning
- 3) Describe the purpose/value of core theme planning and how it impacts/influences policies and processes at TRU (e.g. curriculum development, general education, capital planning, SIFs, etc.)
- 4) Define the following terms and provide examples for each in the context of core theme planning:
 - a. Objectives
 - b. Outcomes
 - c. Indicators

- d. Threshold ranges
- e. Mission fulfilment
- 5) Apply basic concepts of evaluation and planning to identify key performance indicators (KPIs) relevant to their specific core theme, specifically:
 - a. Explain the difference between inputs and outcomes and provide examples for each
 - b. Describe the difference between quantitative and qualitative indicators
 - c. Identify qualitative indicators relevant to their specific core theme

2. Revised Core Theme Workbook Template

In April 2020, the Accreditation Steering Committee approved revisions to the Core Theme Workbook template. The revisions include the following:

- clarified roles and responsibilities of standing committees of Senate;
- reduced duplication and overly technical language; and,
- created opportunities to tell TRU's story and different layouts that allow for narrative, non-linear descriptions, including the use of qualitative indicators.

3. Mission Fulfilment Website

Communication plays a pivotal role in increasing the impact of mission fulfilment planning and evaluation, particularly in terms of educating the TRU community and building a data-informed culture. To facilitate this, in Spring 2019, the Office of Quality Assurance, Integrated Planning & Effectiveness, and Marketing & Communications began discussing enhancements to TRU's mission fulfilment website. In particular, the conversation centered on methods for building a dynamic educational site that will inform continuous quality improvement by including data dashboards and narratives. It was our intent to have the site completed by summer 2020; however, Covid-19 has impacted our timelines, and we do not anticipate that the site will be ready this year.

4. Interculturalizing Performance Measurement Systems

TRU strives to develop a performance measurement system that is meaningful and considers our unique context and demographics. To ensure the indicators we select are culturally sensitive and appropriate, and that the data analysis considers a strengths-based approach, TRU is seeking guidance from the Intercultural Understanding Subcommittee of Senate, which includes Indigenous faculty and staff, and is chaired by TRU's Intercultural Coordinator. In Summer 2020, the committee began the process to revise its terms of reference to include the mandate: "To advise Senate on interculturalizing performance measurement systems." This change will go forward to Senate Steering Committee for approval in Fall 2020.

Recommendation 2. Finalize development of a General Education program including the approval of its proposed General Education Model, of courses for the Model, and of an assessment plan for the Model (Standards 2.C.9 and 2.C.10).

TRU is required to submit an Ad Hoc Report by August 15, 2020 detailing its progress towards meeting Recommendation 2. A full account of our actions towards meeting this recommendation are contained within that report.

The report was approved by TRU Senate on June 8, 2020 and TRU Board of Governors on June 19, 2020. TRU submitted its *Ad Hoc Self-Evaluation Report* to the NWCCU on June 22, 2020.

Recommendation 3. Establish learning outcomes for all courses and programs, and establish a regular process whereby program faculty collect, reflect on, and act as

appropriate on meaningful data regarding student learning, including general education (Standards 4.A.3 and 4.B.2).

As per policy ED 8-3 Course Outlines, faculty members are required to include learning outcomes (also called educational objectives) within each course outline. Course outlines are provided to students the first day of class; as such, all TRU courses provide expected learning outcomes to students.

Over the past several years TRU has engaged in a comprehensive initiative, led by Centre for Excellence in Learning and Teaching (CELT), to identify and/or revise program learning outcomes for programs in which this was outstanding. The teaching fellows in CELT have worked with many program areas to articulate the program learning outcomes and complete a program curriculum map which identifies the linkage between course and program learning outcomes.

Assessment of student learning in courses and programs is the responsibility of the faculty member who is assigned to teach the course. Methods of evaluating student achievement vary by faculty member, discipline and academic level, and reflect disciplinary standards and best practices. According to policy ED 8-3 Course Outlines, an approved course outline includes a description of the means by which the student will be evaluated or assessed as meeting the course learning outcomes (e.g. assignments, examinations, tests, quizzes, or other forms of student evaluation). Faculty who wish to enhance or change their assessment methods have access to CELT and the teaching fellows for assistance as needed.

On June 7, 2019, the Teaching and Learning Committee of Senate approved the establishment of a Learning Outcomes and Assessment Taskforce (LOATF) for a term of 24 months with the purpose of creating a principles document along with associated resources that will establish an approach to the development, monitoring, and regular review of program and course learning outcomes and assessment. LOATF will:

- 1) draft principles to guide the establishment and use of learning outcomes for curricular assessment at TRU; and,
- 2) recommend a model of continuous learning outcomes assessment and curriculum review which would fit within structures and processes that are already established.

LOATF has been meeting monthly and is expected to bring recommendations forward to APPC by spring 2021.

Recommendation 4. Continue to evaluate, update, and finalize internal financial controls (Standard 2.F.4).

TRU continues to review our processes and internal controls for all financial processes.

In 2019, TRU completed a review of the revenue, cash handling, and tax process for the Athletics department. This review and resulting changes strengthened the internal controls in Athletics. A follow-up is planned for late 2021 to review the effectiveness and adherence to these processes.

In 2018 and 2019, TRU initiated a review of the internal controls for the Purchasing Card program, which resulted in a revamping the processes, training, and monitoring of the program. The changes were implemented in the fall of 2019 and have resulted in greater efficiencies in training and compliance to the policies on use of purchasing cards for travel, hosting, and purchasing supplies.

In 2019, TRU initiated a review of capital asset tracking, which resulted in a strengthening of the controls for tagging and tracking of new equipment purchases. In 2020, a review of the equipment disposition process will be initiated as the next stage of internal controls on equipment.

The financial internal controls review process is an ongoing project and each year Financial Services will continue to review and implement improvements to select processes and internal controls.