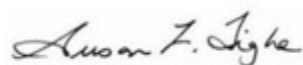


I am pleased to make public the Progress Review on the MacPherson Institute, which took place in the fall of 2022. McMaster University is known for Teaching and Learning excellence and it is important that we continually assess our resources and supports as we fulfil our mission of graduating students who are engaged and informed citizens, ready for the future of work.

The work of the reviewers and their efforts to connect with deans, instructors, staff, campus partners and students is appreciated as they sought to have a full understanding of the progress made since the initial assessment in 2018. I welcome their recommendations and I am thankful for the engagement by MacPherson leaders and staff.

Progress reviews provide valuable information on the effectiveness of actions taken and highlight work that is yet-to-be done. By all measures, the Progress Review herewith shows the MacPherson Institute has made great strides on the planned strategic initiatives with positive results as evidenced by the feedback from campus community members, particularly those in McMaster's six Faculties.

The Office of the Provost will continue to support the work of the MacPherson Institute and I look forward to seeing more innovative approaches to teaching and learning developed at McMaster.



Susan Tighe
Provost and Vice-President (Academic)

Report on the progress since the 2018 Review of the
MacPherson Institute, McMaster University

October 23, 2022

Review team:

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Purpose

This review is designed for the MacPherson Institute to provide an update on the implementation plans and progress made within the MacPherson Institute since the External Review of its activities in September 2018.

The objective of the review is to invite the external review team to offer commentary on the progress made in responding to the Recommendations from the 2018 External Review on Teaching and Learning, where within the scope of the MacPherson Institute, and to offer commentary and recommendations that could help finalize the MacPherson Institute's next strategic directions. (Office of the Provost & Vice-President Academic, October, 2022)

Over-arching comments

The scope of the review that led to the creation of this report focuses on the response of the MacPherson Institute (MI) to the recommendations of the 2018 Review of Teaching and Learning, within the MI's scope of practice. The two of us who were part of the original review team have greatly appreciated the opportunity to come back and 'close the loop' on the progress made, and offer thoughts as the MI charts the next chapter in its development.

Overall, it was clear from the written materials provided in advance, and confirmed during the many excellent, wide-ranging and open discussions during our visit, that the MI has invested a huge effort to respond, in ways appropriate to its institutional culture, to the recommendations of the 2018 external review. Significant and impactful changes have already been implemented and additional initiatives are works-in-progress. Intentional, systematic assessment has been an integral part of these change processes, and early evidence indicates these efforts are having positive impacts. This evidence is informing ongoing work.

Unsurprisingly, a common thread in many of our discussions about charting a path forward involved the disruptions brought by the COVID-19 pandemic, the institutional response to these challenges, and the evolving 'new normal' context at McMaster –experiences shared by most institutions. We will not continually reference this larger context in the commentary that follows, but note that the progress made by the MI – notwithstanding the challenges, uncertainties and increased volume of requests for support – has also quite possibly been catalyzed by the COVID experience over the past few years.

The review team appreciated and respected the quality of the work reflected in the documents made available to us. Our report is based on these documents and on opportunities to meet with MI staff, representatives of other units supporting teaching and learning, faculty and senior administrators of the University.

Responses to the Terms of Reference for the Review

1. *Review progress made by the MacPherson Institute on those recommendations from the Review of the function of Teaching and Learning within the scope of the Institute. Specifically,*
 - a. *Decouple the Vice Provost Teaching and Learning position from the MI Directorship*

The two roles have been decoupled, and this is an important first step. There is a clear structural separation of roles, but the scope of these roles was not clearly articulated in the information provided. This observation was reinforced during our site-visit conversations: there is confusion amongst stakeholder groups in this respect. Based on our discussions during the review, the Vice-Provost Teaching and Learning (VPTL) and the MacPherson Institute (MI) Director are working closely together and have an open and trusting relationship, but it remains a work-in-progress to both differentiate and identify synergies between the VPTL and MI Director roles. The reviewers acknowledge that the VPTL has only recently been formally

appointed, but further clarification of these roles and the relationship between them is an essential next step.

Recommendation: The VPTL and the MI Director should prioritize the articulation of the scope of their roles in a way that recognizes both differentiation and synergies between these two essential leadership roles.

- b. Constitute an internal Advisory Board/Network to provide input and feedback to the leadership of MI*

A Teaching and Learning Advisory Committee has been constituted, and has engaged in a series of meetings and discussions; during the pandemic this focused on addressing immediate issues. Although members of this Committee appreciated the quality of the discussion among members from diverse backgrounds, the role of the committee in its current form is not clearly understood and we heard diverse views among members of the committee we spoke with as to what the role should be. In addition, we understand that other committees / working groups have been created to support the development of the *Partnered in Teaching and Learning* strategy: there is the potential for (and, indeed, some evidence of) overlap and confusion as to purpose and mandate. Finally, the stated terms of reference for the advisory committee contain elements that we would consider to be more of a 'steering,' rather than advisory, function.

Recommendation: The VPTL should reassess the role of the Teaching and Learning Advisory Committee, particularly in relation to other committees and working groups that are advancing teaching and learning at McMaster.

- c. Engage in community consultation to clarify the mission and mandate of the MacPherson Institute*

This has been accomplished, with input from both within and beyond the MI. Of equal importance, MI staff, McMaster faculty, and other stakeholders provided evidence during the site visit that the MI values, mission and mandate were being lived in practice: within the MI and in the larger community. The shift towards a more collaborative, transparent, equitable, and caring culture of professional practice was noted by MI staff and a broad range of stakeholders we spoke to during the site visit. The review team recognized this shift as a fundamental change in MI culture and appreciated the intentional and challenging work that contributed to this outcome over a relatively short time span. That said, maintaining a strong alignment across vision, mandate, values and practice will be essential to the success of the MI going forward.

- d. Develop an integrated, institutional-level teaching and learning strategy*

The development of *Partnered in Teaching and Learning: McMaster's Teaching and Learning Strategy 2021-2026* has been completed, and it is clear that the MI has been part of this process. The implementation of this strategy is in its early stages, and promises to be an exciting and complex process. Our conversations with multiple stakeholders underscored that a key next step (see commentary on (2) below) will be to devise and prioritize implementation actions, identifying key contributors and their roles, and articulating what constitutes success.

- e. *Assess the Institute's current leadership and organizational structure and determine how best to deploy resources to fulfill mandate*

The MI leadership and staffing has been successfully restructured, through an iterative process of consultation and discussion. There is strong evidence that the new structure is working effectively. The current MI Director has demonstrated strong leadership within the MI and across the McMaster community. Within the MI, she has cultivated distributed leadership across teams, strengthening the leadership of the MI as a whole, facilitating communication, collaboration, and responsiveness. The review team was impressed with the care and compassion shown to MI staff during this change process, and it is clear that this approach enabled an effective response to the pandemic.

Mi teams have been reorganized to bring more coherence to each team's work and to foster sharing of expertise and resources across teams. Across programming areas and career spans, we heard comments from MI staff around improved communication, workflow and unit work culture. Site-visit participants from across the University also noted the MI's enhanced engagement, communication and commitment to deploying resources in ways that include addressing local teaching and learning needs. The MI continues to assess structures and operations to determine if any refinements are necessary.

- f. *Evaluate the current broad range of program offerings to ensure a broad spectrum of support to a wide range of faculty members in flexible formats that lower barriers to engagement*

A comprehensive review of programs was conducted in 2020, and an overarching "pathways" approach was implemented to streamline programming and make it more coherent, comprehensible and accessible to stakeholders. As in every institution, the pandemic disrupted the best laid plans, and MI resources were redeployed to provide essential support for virtual teaching and learning experiences. (It was noteworthy that the decision to implement the Faculty Liaison approach as one of the early program initiatives was recognized across academic units as being critical to the University's successful pandemic response.) The broader implementation of the revised programming plan began in 2021, and ongoing refinements will continue with a focus on equity and accessibility of programs. Feedback from faculty members and academic administrators spoke to the ways that programming changes have already increased access to and relevance of the programs offered by the MI. While the digital pedagogies team remains strong, staff deployed during the pandemic to strengthen support the development of virtual learning experiences are returning to their primary teams, so further

changes in program offerings, particularly in the areas of professional development for teaching and faculty research on teaching and learning, can be expected.

- g. Develop effective ways to enhance collaboration and provide 'on the ground' support to Faculties and the Arts and Science Program (a 'liaison' approach)*

The Faculty Liaison model (facilitated by Faculty-specific Key Contacts) was introduced in 2019, and reviewed in 2021. It has been, without a doubt, a huge success, notwithstanding the challenge of staff turnover in liaison roles. In our discussions with faculty and academic administrators, there was almost universal mention of and appreciation for the liaison model, animated with stories of tangible and evident impact. A significant factor in the success of the Faculty Liaison program is the investment in relationship building between individual MI staff members and faculty members in their own contexts. Trust-building is an important aspect of relationship building, but so is the opportunity for Faculty Liaisons to appreciate the culture of and knowledge about teaching and learning in specific disciplines.

Faculty Liaisons work closely together to share effective practices. With respect to working with individual faculty members, they share experiences of how to make it easy for individuals to access MI resources, how to collaborate with faculty to address the discipline-specific learning challenges experienced by their students, and supporting colleagues interested in trying new approaches to teaching. Our conversations with Faculty Liaisons and Faculty-level academic administrators also underlined the importance of the liaison role being seen as a key contributor to Faculty-level teaching and learning leadership tables to maximize their impact. Because Faculty Liaisons are also members of a MI program area team, they are able to share their insights about teaching and learning in specific disciplines to enhance central programming.

The review team members from the 2018 review noted another role that the Faculty Liaisons are playing /or have the potential to play: connecting people with shared interests and expertise in teaching and learning across units. This network building responds directly to a concern voiced by faculty in the 2018 review about the lack of ways for committed teachers to connect with each other. People who can facilitate these connections are critical to building strong teaching and learning networks, animating knowledge flow, collaborations and knowledge creation within and across disciplines.

- h. Increase coordination across units that provide support for teaching and learning, and particularly with respect to educational technology*

As in our 2018 review, our conversations during the site visit revealed a deep commitment to teaching and learning across non-academic staff in diverse functions who contribute in different ways to overall teaching and learning experiences. The review team met with representatives from a number of non-academic units who support teaching and learning and engage in a variety of ways with the MI. We had no opportunity to discuss partnerships with UTS during our

visit. UTS has been and will continue to be an essential partner in teaching and learning, particularly given the nascent digital learning strategy.

Our conversations revealed that the process of building a more cohesive network of these partners is on-going and that effective functioning of these partnerships will be key to supporting and advancing institutional goals. In particular, the MI has intentionally reached out to individual units to partner on specific areas of shared interest. These partners value these collaborations, and one suggestion that emerged from our discussion was that meeting as a ‘partners roundtable’ could replace a number of individual meetings, foster a richer network of partners, encourage reciprocity among units, and help manage workloads across units. The MI framing of understanding roles in partnerships (who is leading, partnering, supporting) is a useful way to clarify expectations and ensure everyone is ‘on the same page’. Creating sustainable network of partners will be critical to the implementation of the *Partnered in Teaching and Learning* strategy.

Recommendation: consider convening a ‘roundtable’ of partners from non-academic units who support teaching and learning activities as a mechanism to share knowledge, enable reciprocal support, and foster a cohesive distributed partnership network to support teaching and learning at McMaster.

- i. Articulate why research in teaching and learning is important for the institution and how findings can be used to better understand and enhance the learning experiences of McMaster students; how this research is recognized in career development, permanence, promotion and merit.*

This work was started, but was understandably delayed, while the MI focused its resources on the University’s response to the pandemic.

As is often the case with this type of scholarship, the work of individual faculty members has advanced faster than the institutional infrastructure for supporting, recognizing and rewarding the scholarship of teaching and learning in academic careers. The valuing of such scholarship in career progression is essential to the impact of this work in faculty careers and in the advancement of teaching and learning at McMaster. The MI, in partnership with a network of colleagues engaged in teaching and learning scholarship, took a systematic, inquiry-driven approach to surveying faculty with respect to how they conceptualize teaching and learning inquiry and what motivates this work. The survey revealed that McMaster faculty conceptualize this work as “research on teaching and learning” and the survey results have been integrated in a working paper. An associated statement on the significance of research on teaching and learning has also been developed. These documents can provide a foundation for discussions of how research on teaching and learning is integrated in career advancement policies, procedures and practices across the University.

In the meantime, the MI has created a restructured team to offer more integrated support for research on teaching and learning, is curating resources to ensure that engaging in teaching and learning research is more accessible for faculty members, is strengthening infrastructure to facilitate teaching and learning knowledge flow, and has created a system that can be used to create a record of teaching and learning research activity.

Following the comprehensive review of programming in 2020 and the redeployment of staff from pandemic support, the MI has focused its support in three areas:

- supporting faculty members from across disciplines to engage with teaching and learning scholarship, particularly in the teaching stream
- supporting research to inform key institutional priorities as determined by the VPTL
- recognizing and celebrating achievements in the scholarship of teaching and learning.

The review team heard from faculty who expressed appreciation for the MI as the primary support for their teaching and learning research. The MI's role in supporting faculty work in this domain is well established. This is an opportune time to engage in the broader issue of how research on teaching and learning is integrated in career advancement policies, procedures and practices across the University.

Recommendation: Leverage the foundational work conducted by the MI, in partnership with a network of colleagues engaged in teaching and learning scholarship, to inform institutional discussions of how research on teaching and learning is integrated in career advancement policies, procedures and practices across the University.

- j. Develop a strategy for communicating what the MacPherson Institute does, with attention to internal communications between MI teams, external communication to and from partners, and celebrating teaching and learning.*

A new communications leadership position has been created to facilitate both internal and external communications and has been very successful. Partners from around the university told us that they perceive a notable improvement in communications from the MI about professional learning opportunities, and also appreciate the dissemination of narrative stories about the impact of teaching and learning practice and research. The Faculty Liaisons also facilitate information flow to and from the Faculties. The MI has undergone significant changes, and effective, multidirectional communication is essential to keeping the McMaster community informed about the ways in which the MI supports individuals, programs and the University in their teaching and learning goals.

Teaching and learning leadership, ownership, and support is a complex, distributed enterprise. One of the challenges in complex, distributed systems is communication across nodes in the organizational structure. This is a broader institutional challenge. Most academic staff participants in the site visit had observed significant improvement in MI communications. The Deans we spoke with were generally aware of and positive about changes in MI engagement in their Faculties, and appreciated updates from the MI Director. The Deans also voiced a desire

for discussions with the VPTL as plans for new teaching and learning initiatives are developing (particularly if they have resource implications), so that the Deans have an opportunity to provide input as plans are being developed.

These observations raise a few considerations for on-going work with respect to communication. First, the volume and digestibility of some MI communications could be reconsidered. This challenge has been noted across institutions, and perhaps there is an opportunity at McMaster to engage Faculty Liaisons to play a curative role in targeting MI communications to individual Faculties and groups. Second, there is an opportunity for more discussion between the VPTL and the Deans as plans for priorities and initiatives are in development – particularly those with resource implications. Third, and related to articulating the roles of the recently formed office of the VPTL and the MI, there is a need for on-going attention to coordinating communications between the office of the VPTL and the MI.

- k. Review the balance of continuing and contractual positions, within the constraints of the budget, with consideration for a broadly equitable and consistent approach across MI teams*

There has been considerable attention to this recommendation, within resource constraints. The MI engaged an HR Strategic Partner on a limited-term appointment to help the unit develop broadly equitable and consistent practices for all MI members, regardless of continuing or contractual employment status. Policies have been developed on flexible working arrangements and on/off boarding processes. These are resources that can likely be adopted/adapted for use in other units, as well.

2. Review the MacPherson Institute draft strategic themes and possible directions in relation to the broader *Partnered in Teaching and Learning* strategy and comment on any additional opportunities for consideration in the Institute's next directions.

The review team's discussion of this request was different than the other terms of reference, in that it occurred primarily within the review team, informed by what we heard during the site visit, enabled by insights from the internal member of our team, and informed by the broader experience of the review team. As always, our suggestions should be considered in McMaster's particular context, and taken up as deemed appropriate to advancing institutional goals.

Across many of our discussions, we heard from McMaster community members that there was a need to articulate how the multiple institutional strategic plans, initiatives and priorities around teaching and learning relate to each other, and to identify the priority areas for focus across all of these plans. There was an appreciation for the considerable attention focused on teaching and learning, but also a repeated request across groups for help in "connecting the dots" – perhaps something as simple as a graphic representation that makes connections and proximities visible. These connections need to be identified before it is possible to fully clarify the role that the MI is expected to play in the implementation of these priorities. Furthermore, it is a vital pre-requisite to the MI articulating their own strategic priorities in support of broader institutional priorities.

The review team is strongly supportive of the work undertaken to define the nature of the MI's roles in partnership activities. Understanding where the MI is leading an initiative, where it is partnering with other units and influencing the direction of an initiative, and where they are supporting initiatives led by others will clarify expectations, improve efficiencies and reduce the chance of friction between groups and individuals who are not clear as to their role in a given project.

On the subject of MI draft strategic themes and possible directions, we acknowledge this is a work-in-progress and early draft. Further to the comments above on the need to articulate institutional priority actions, the reviewers made a number of more specific observations that we hope will contribute to the ongoing development of the MI's strategic priorities:

- We note an asymmetry in scale and scope of some of the activities in the MI draft strategic themes. Some of these are very much operational aspects that are internally MI-focussed. For instance, the MI operations items in the process column could be moved from the external facing strategic plan and placed on an internal action priorities list. In contrast, other themes could require significant and multi-year projects and initiatives, depending on how the *Partnered in Teaching and Learning* strategy priorities evolve, and it would be helpful to both MI and University-wide audiences to acknowledge the scale of these themes.

- Building on the MI's commitment to clarify the nature of their partnership roles for themselves and their growing number of partners, the MI might consider how to apply the leading, partnering, and supporting framework as verbs in the programming column. Making the anticipated partnership roles explicit would clarify expectations, and help workload planning.
- We also noted some misalignments across partnering and programming columns. For instance, the MI commits to a strong partnership to support significant aspects of the *Partnered in Teaching and Learning* strategy, but has not yet specified how this will translate into a potentially huge commitment to programming over the next strategic planning cycle.
- One challenge for the MI that we heard in a several conversations over the site visit is that MI strategic themes are very broad ranging. Especially with the attention that will be focused on *Partnered in Teaching and Learning* strategy priorities during the next strategic plan cycle, the MI should plan on regular internal reviews of its existing program offerings, in order to make room for new initiatives as they arise.

Conclusion

In closing, the review team would like to express our gratitude to everyone who participated in the review process. The quality of the documentation provided and the open, collegial, and candid conversations we experienced during the site visit speak to a broad commitment to teaching and learning. We are grateful, also, to Nancy McKenzie, who provided outstanding administrative support for our review.

As we noted at the outset of our report, the response of the MacPherson Institute and the University to the 2018 review recommendations has been carefully thought out and, consequently, has already had a strong impact within the MI and across the University community more broadly. Although the change process the MI has undertaken is complex and will continue to evolve, the experiences described across the diverse groups we spoke with during the site visit indicate that a significant amount of change has taken place. These changes are not trivial. There has been a palpable shift in the work environment and organizational structure of the MI. The approach to providing teaching and learning support to participating Faculties has been shifted to a Faculty Liaison model, and is already flourishing. It was noteworthy that each major area of renewed programming – professional development for individual teachers, academic partnerships, curriculum development (including IQAP), digital pedagogies, and research on teaching and learning – were recognized by multiple participants as valuable. At the same time, the role of the MI as a trusted partner to other units and to the newly appointed VPTL is being established. These developments have required strong leadership and hard work on the parts of everyone at the MI and the many colleagues who

have supported their change processes. This outcome is all the more remarkable given that a good part of this work took place during the pandemic.

There is still work to be done, and the changes facing postsecondary education will likely ensure that this will always be the case. The relationships, ways of working, and spirit of collaboration that have been forged over the last several years will serve the MacPherson Institute and McMaster University well as you continue to support the development of individual learners and teachers, programs, and the teaching culture of your institution.