

Summary of Meeting of Task Force on Evaluation,
Accountability and Measurement
(Monday, February 9, 2009, 2:30 p.m. – 4:00 p.m.)

1. The meeting began at 2:30 p.m. David Capson, Andrea Farquhar, Mita Giacomini, Milena Head, David Hitchcock, Bob McNutt, Karen Menard, Jackie Osterman, Lilian Scime and Mike Veall were able to attend. Regrets were received by the other Task Force members. In addition Ying Liu of the Office of Institutional Research and Analysis was present as a resource person.

2. To save time, the Chair (Veall) had pre-circulated some written remarks. He noted that he had met with the Provost about plans for the Task Force given that (a) with pressing matters facing the Department of Economics he did not have sufficient time for the Task Force and (b) he was going on Administrative Leave as of July 1. The Provost felt that the best solution was to make Karen Menard co-chair, as she would be playing an increasing role anyway. This would also better ensure some continuity should the Task Force continue next year, although the plan would be still to recruit another Chair in that event. The Task Force agreed with the suggestion that Karen Menard be made co-chair, without dissent.

The Chair noted his personal and not-strongly-held view that it would be best to stop in May and leave matters to the Refining Directions Implementation Plan Committee. He outlined a timetable that would lead to a report in May (based on what the Task Force learned from the initial feedback, the Units survey, the pilot exercises (described more below), the work Karen Menard will be presenting, other sources such as the OCUFA conference and our own discussions). He noted that meeting last year in June had not been successful so that the Task Force would be ending in May.

3. The Chair reported three pilot exercises were underway involving the Department of Biochemistry and Biomedical Sciences (Chair Eric Brown), the Department of Political Science (Chair Robert O'Brien) and Parking and Security Services (Chair Terry Sullivan). In all cases the main goal of the exercise was to determine how the unit itself would think it should be evaluated in a manner that would be feasible, timely, regarded as reasonable within the area and by others at other universities associated with similar units and would be understandable to others in the university community, including those in the Administration. In the case of Parking and Security, we already had one presentation (in May) of the progress that has been made in their evaluation (then as Grounds, Parking and Security) as part of the "Inspiring from Within" initiative. The Chair noted that he and Karen would meet with the heads of these groups. Lilian Scime had kindly set up the meeting with Parking and Security and agreed to participate in that.

4. David Hitchcock wrote a written report on the Ontario Council of University Faculty Associations conference "Accounting or Accountability in Higher Education". The Chair thanked David and he in turn thanked Ying Liu for his input into the report. Karen Menard had also attended. While it is impossible to summarize briefly the remarks of 22 hours of

session, some of the main points raised by David in his report (and by Karen and Ying in the discussion were):

a) There is continuing tension regarding the need for accountability. As one speaker pithily said, "Trust is cheaper." It is not clear that accountability passes the benefit cost test. But another said "Accountability is burdensome but won't go away." It was also noted that it might provide an opportunity to showcase what we do. All of these points resonated with the Task Force.

b) There is a need for an accountability framework to replace the hodgepodge of overlapping reports that are now required. It is estimated McMaster prepares at least 80 such reports per year, many for the province. It is felt that even when it becomes clear that these reports are not useful, the provincial demand for the reports continues. And many of those required to report feel that the time they spend compiling and explaining numbers (and their changes) is an obstacle to solving actual problems. This resonated with the Task Force as well.

c) The efforts to develop CUDO, Common University Data Ontario, were praised at the conference.

d) One speaker emphasized that methods of accountability must be seen as relevant by stakeholders, enhance trust, contain fair judgments on performance and be open for feedback and dialogue. Other speakers made similar remarks. This is consistent with discussions we have been having within the Task Force. This same speaker emphasized that internationally, the depth of evaluation varied considerably, with Finland using a minimalist approach and England using an approach described as "carpet bombing".

e) There was emphasis that measures become targets. So it is important to choose measures carefully with that in mind. For example, accountability measures should be kept separate from rankings. There should be an emphasis on (important) output measures. There needs to be clarity and purpose. And having a number of measures may have some advantages (as one speaker described a single measure as "pernicious").

f) A number of speakers referred to the Shanghai Jiao Tong rankings, on which McMaster ranks 89th, as the "gold standard", although these are only research rankings.

g) The National Survey of Student Engagement (NSSE) was often described as a possible source of measures.

h) Measurement of groups within an institution might be more important than overall measures.

5. Karen Menard then made a substantive presentation to the committee on Key Performance Indicators, focusing on what the University of Toronto, UWO, Queen's the University of Ottawa and the University of Waterloo were doing. While there was much important detail in the presentation, it is important to note that all are making some public presentation of key performance indicators but no two universities do it the same way. It was noted there are two

basic types of presentations: one especially for external parties (prospective students, government and other institutions) and others for internal constituencies.

While no decisions were made during the presentation, clearly there were strong arguments for having a single place for this information ("one stop shopping"); but exactly what to present remains a difficult decision. For example there was an extended discussion of what kind of information should be presented, if any, that would derive from student ratings of instructors. Perhaps the over-riding issue was the difficulty of taking university-level indicators and "drilling down" to underlying units.

Nonetheless, Karen's work provided a valuable overview. Her presentation will continue at the next meeting, emphasizing student surveys such as NSSE.