TEACHING AND COURSE EVALUATION
PROJECT CHARTER

MARCH 5, 2012

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## DOCUMENT CONTROL

### DOCUMENT INFORMATION

<table>
<thead>
<tr>
<th>INFORMATION</th>
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</thead>
<tbody>
<tr>
<td>Document Owner</td>
<td>Corinne Pitre-Hayes</td>
</tr>
<tr>
<td>Project/Organization Role</td>
<td>Project Manager</td>
</tr>
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</table>

### DOCUMENT HISTORY

<table>
<thead>
<tr>
<th>VERSION</th>
<th>ISSUE DATE</th>
<th>CHANGES</th>
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<td>1.0</td>
<td>Jan 5, 2012</td>
<td>Outline</td>
</tr>
<tr>
<td>1.1</td>
<td>Jan 10, 2012</td>
<td>Draft for core team review</td>
</tr>
<tr>
<td>1.2</td>
<td>Jan 11, 2012</td>
<td>Draft for SCUTL Committee review and approval in principle</td>
</tr>
<tr>
<td>1.3</td>
<td>Feb 5, 2012</td>
<td>Updated with SCUTL feedback for core team review</td>
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<tr>
<td>1.4</td>
<td>Feb 10, 2012</td>
<td>Core team revisions for distribution to SCUTL for feedback</td>
</tr>
<tr>
<td>1.5</td>
<td>Mar 5, 2012</td>
<td>Approved version with final wording changes from SCUTL</td>
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### DOCUMENT APPROVALS

<table>
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<th>ROLE</th>
<th>NAME</th>
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<tbody>
<tr>
<td>Project Sponsor</td>
<td>Dr. Jon Driver</td>
<td></td>
<td>March 28, 2012</td>
</tr>
<tr>
<td>SCUTL Committee</td>
<td>Chair, Stephen Spector (on behalf of the Committee)</td>
<td></td>
<td>March 28, 2012</td>
</tr>
<tr>
<td>Project Manager</td>
<td>Corinne Pitre-Hayes</td>
<td></td>
<td>March 28, 2012</td>
</tr>
</tbody>
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1 PROJECT CHARTER PURPOSE

This project charter defines the scope, objectives, and overall approach for the Teaching and Course Evaluation Project (TCE). It is a critical element for initiating, planning, executing, controlling, and assessing the project. It is a single point of reference on the project for project goals and objectives, scope, organization, estimates and work plan. In addition, it serves as a contract between the core project team and the project sponsor, stating what will be delivered according to the budget, time constraints, risks, resources, and standards agreed upon for the project.

2 EXECUTIVE SUMMARY

- The project goals are to support teaching and enhance student learning through the responsible use of teaching and course evaluation data and information at SFU.
- The objectives include:
  o Replacing SFU’s instruments and processes for student evaluation of teaching by instructors.
  o Replacing SFU’s instruments and processes for student evaluation of courses.
  o Engaging the SFU community throughout the project e.g. open forum discussion sessions on each campus, meetings at the faculty and/or departmental level, focus groups, input via social media, and surveys.
  o Developing a best practices guide on interpretation and use of the data.
- The project will be in three phases:
  I. Environmental scan and needs assessment
  II. Instrument Development
  III. Instrument Implementation Planning & Documentation
- Key assumptions include that there are proven course and teaching evaluation instruments and practices that will be well suited to SFU’s needs and that it will be possible to achieve a reasonable consensus among all affected SFU constituencies.
- The project is expected to run from October 2011 through December 2012; the timeline may need to be extended based on the outcome of each phase.
- The approach is to use a robust project organization that includes a Core Team producing deliverables and the SCUTL Committee that will review and recommend deliverables on a timely basis. Project communication will be key and will be facilitated by a project website. Issue escalation will be swift with similarly rapid resolution.

3 OVERVIEW OF THE TCP PROJECT

The goal of this project is to support teaching and to enhance student learning at SFU. It carries forward the earlier work by the Senate Committee on University Teaching and Learning (SCUTL) and the Task Force on Teaching and Learning (TFTL), and responds to concerns that current evaluations by students could provide more useful feedback to instructors for the purposes of self-evaluation, and higher quality information to those who evaluate performance for reappointment, salary review, tenure and promotion.

It is important to stress that the project does not arise from significant dissatisfaction on the part of students or academic administrators about the quality of instruction or curriculum. Rather, the purpose of the project is to develop an updated instrument and process for student evaluation of teaching that reflects new understanding from educational research on such evaluations. It also provides an opportunity to consider how these evaluation processes could be used to gather information on student learning, and thus to focus less on student perceptions of instructors, and more on how students learn.
During the course of the project there will be opportunities to provide input and feedback. Ultimately, Senate, as the representative body that governs academic matters, will be asked to approve the final outcome of this project.

4 SCOPE OF THE PROJECT

4.1 GOALS AND OBJECTIVES

<table>
<thead>
<tr>
<th>Goals</th>
<th>Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support teaching and enhance student learning at SFU</td>
<td>1. Replace SFU’s instruments and processes for student evaluation of teaching and courses</td>
</tr>
<tr>
<td></td>
<td>2. Engage the SFU community throughout the project e.g. open forum discussion sessions on each campus, meetings at the faculty and/or departmental level, focus groups, input via social media, and surveys</td>
</tr>
<tr>
<td>Responsible use of evaluation data</td>
<td>3. Develop a best practices guide on interpretation and use of the evaluation data</td>
</tr>
</tbody>
</table>

4.2 ORGANIZATIONAL IMPACTS

<table>
<thead>
<tr>
<th>Organizational Group</th>
<th>Impact to and Participation of Organization Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructors at SFU responsible for teaching courses, including tenured and tenure-track faculty members, lab instructors, lecturers and senior lecturers, limited term appointments, and sessional instructors</td>
<td>Very significant impact personally and professionally; the project will invite input from the instructors throughout the project including: open forum discussion sessions on each campus, meetings at the faculty and/or departmental level, focus groups, input via social media, and surveys.</td>
</tr>
<tr>
<td>Students</td>
<td>Major impact on their ability to provide feedback on the SFU learning environment; the project will similarly invite input from students throughout the project.</td>
</tr>
<tr>
<td>SFUFA and the TSSU</td>
<td>Significant changes that affect SFUFA and TSSU members; the project will invite input from the SFUFA and TSSU throughout the project.</td>
</tr>
<tr>
<td>Tenure and Promotion Committee chairs</td>
<td>Significant changes that affect how Tenure and Promotion Committee chairs work with course and evaluation data at SFU; the project will invite input from the Tenure and Promotion Committee chairs throughout the project.</td>
</tr>
<tr>
<td>Academic departments</td>
<td>Significant changes that affect how academic departments work with course and evaluation data at SFU; the project will invite input from academic departments throughout the project.</td>
</tr>
<tr>
<td>Administrative staff involved in managing teaching and course evaluation processes</td>
<td>Potentially significant impact on the processes used to do their work; the project will similarly invite input from administrative staff throughout the project.</td>
</tr>
<tr>
<td>Office of the Vice President, Academic and Provost</td>
<td>Provide linkages to related and ongoing initiatives.</td>
</tr>
</tbody>
</table>
4.3 **PROJECT PHASES**

<table>
<thead>
<tr>
<th>Phase</th>
<th>Tasks</th>
</tr>
</thead>
</table>
| I. Environmental scan and needs assessment | • Review SFU documents, professional and academic literature, work at other institutions and provide summary to support SFU community as project participants  
• Circulate summary of literature findings to SCUTL and the project team  
• Identify constituencies  
• Consult with SFU constituencies for input on the development of the instrument through meetings, info sessions, focus groups, surveys  
• Identify people/groups interested in being more actively involved in the project  
• Finalize details of project process and specifics of timelines based on feedback  |
| II. Instrument Development                 | • Develop the instrument: construct mapping, clarity, validity, reliability  
• Provide constituencies with specifics of timelines for their input  
• Incorporate feedback to revise instrument and follow up with constituencies  
• Pilot the instrument to select group within SFU (guided by recommendations from SCUTL and the SFU community) and accompanied by the draft user guide  
• Provide status update to Senate                                                                                                      |
| III. Instrument Implementation Planning & Documentation | • Circulate best practices/guidelines document for effective and responsible use of student evaluation of teaching and courses (based on literature and SFU input)  
• Circulate revised instrument user guide (after revisions to instrument completed)  
• Work with all stakeholders on implementation planning  
• Submit project report and report back to Senate                                                                                     |

4.4 **RELATED INITIATIVES**

SFU is undertaking a number of initiatives that focus on teaching and learning. It is important to note that this project is separate from the consultation about implementation of a learning outcomes and assessment process.

4.5 **OUT OF SCOPE**

Evaluation of the various instruments that are currently in place across the University is not in the scope of this project. SCUTL previously completed a comprehensive evaluation of the University's current practices and tools related to student evaluations of courses and instructors. This project builds on that earlier work.

The project will make recommendations with respect to:
1) Replacing SFU's teaching and course evaluation form(s) in order to improve the teaching and learning environment for course instructors and students
2) Ensuring efficient methods of data collection and storage are used and that the privacy rights of instructors and students are protected, and
3) Adopting guidelines for best practices in the use of evaluation data.
As the focus is on instructors, the evaluation instrument used for TAs and TMs is not in the scope of this project. Additionally, developing methods for faculty evaluation is not in the scope of this project.

Senate, as the representative body that governs academic matters, will be asked to approve the final outcome of this project.

### 4.6 PROJECT TIMELINE

<table>
<thead>
<tr>
<th>Project Phase</th>
<th>Date Estimate</th>
<th>Deliverable(s) Included</th>
<th>Confidence Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase I: Environmental scan and needs assessment</td>
<td>October 2011</td>
<td>• Summary points of findings presented to SCUTL</td>
<td>High</td>
</tr>
<tr>
<td></td>
<td>January 2012</td>
<td>• Finalized content for info sheet</td>
<td>High</td>
</tr>
</tbody>
</table>
| | February-March 2012 | • Confirmed categories of participants  
• Updated draft of process | High |
| | March 2012 | • Summary of approaches used at other universities  
• Status report on date and time of meetings with participants | Medium |
| | March 2012 | • Updated list of participants and meeting dates/times  
• Summary of approaches used in SFU departments  
• Summary of relevant research findings | Medium |
| | July 2012 | • Summary of preliminary input from participants | Medium |
| | July 2012 | • Status report to Senate | High |
| Phase II: Instrument Development | July 2012 | • Status report on development of instrument | High |
| | August 2012 | • Status report on development of instrument | High |
| | September-December 2012 | • Continue collecting and analyzing input from participants | Medium |
| Phase III: Instrument Implementation, Planning & Documentation | January-February 2013 | • Instrument pilot  
• Draft user guide for pilot | Medium |
| | March-June 2013 | • Revised instrument and revised user guide following pilot  
• Best practices | Medium |
5 PROJECT CONDITIONS

5.1 ASSUMPTIONS
- Proven course and teaching evaluation instruments and practices exist that will be well suited to SFU’s needs.
- It is possible to achieve a reasonable consensus among all affected SFU constituencies regarding the most appropriate course and teaching evaluation instrument and processes to replace the existing outdated ones.

5.2 ISSUES

Priority Criteria
1 – High-priority/critical-path issue; requires immediate follow-up and resolution.
2 – Medium-priority issue; requires follow-up before completion of next project milestone.
3 – Low-priority issue; to be resolved prior to project completion.
4 – Closed issue.

<table>
<thead>
<tr>
<th>#</th>
<th>Date</th>
<th>Priority</th>
<th>Description</th>
<th>Status &amp; Resolution</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Jan 10, 2012</td>
<td>High</td>
<td>Overall project charter and plan not yet completed</td>
<td>Expedite approval in principle of charter by SCUTL and complete plan based on approved charter</td>
</tr>
<tr>
<td>2</td>
<td>Jan 10, 2012</td>
<td>Medium</td>
<td>Input and feedback from the SFU community behind schedule</td>
<td>Arrange for distribution of information document; develop and secure approval of communication plan; execute approved plan</td>
</tr>
<tr>
<td>3</td>
<td>Jan 10, 2012</td>
<td>Medium</td>
<td>Consultation with other institutions behind schedule</td>
<td>Develop and secure approval for consultation plan; execute approved plan</td>
</tr>
</tbody>
</table>

5.3 RISKS

<table>
<thead>
<tr>
<th>#</th>
<th>Risk Area</th>
<th>Likelihood</th>
<th>Project Impact-Mitigation Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Misunderstandings</td>
<td>High</td>
<td>• Resistance to the project</td>
</tr>
</tbody>
</table>

For the purposes of continuity, the Project Manager role will have overall responsibility for developing strategies to mitigate risks identified during the course of the project. The implementation of these strategies will also be conducted by the Project Manager in discussion with the SCUTL Committee Chair.
<table>
<thead>
<tr>
<th>#</th>
<th>Risk Area</th>
<th>Likelihood</th>
<th>Project Impact-Mitigation Plan</th>
</tr>
</thead>
</table>
| 1 | Low participation by constituencies | Medium | - Inadequate ownership of the project by constituencies  
- Provide multiple opportunities for participation throughout the project |
| 3 | Low level of support for the new instrument by constituencies | Medium | - Difficulties with implementation  
- Integrate into the project plan formal support for the project at multiple levels |
| 4 | Difficulty using the revised instrument effectively | High | - Data set (from evaluations) not helpful for constituencies  
- Develop and distribute:  
  1. User manual for instrument  
  2. Best practices guide to support effective and responsible interpretation and use of evaluation data |
| 5 | Low level of commitment and follow up by relevant SFU constituents | High | - Take an iterative approach to all aspects of the project to engage constituents on an ongoing basis; look for opportunities to increase commitment and buy-in |

### 6 STRUCTURE AND APPROACH

- The plan to manage the challenges of the project is as follows:
  - Create robust project organization that includes a Core Team producing deliverables, the SCUTL Committee that reviews and recommends deliverables on a timely basis, Project Sponsor that reviews and approves deliverables on a similarly timely basis.
  - Regular meetings of all key groups: Core Team weekly and Steering Committee monthly.
  - Brief but complete documentation that enables everyone to be clear and on the same page.
  - A project website that provides a means of storing a "single version of the truth" and that enables effective collaboration on deliverables.
  - All meetings will include a review of how the team is tracking to the project plan, and discussion of how to correct any delays.
  - If it becomes apparent that there is an issue that will result in a significant delay, the issue will immediately be escalated to the Steering Committee and or the Project Sponsor for resolution.
## 7 PROJECT ORGANIZATION

<table>
<thead>
<tr>
<th>Project Team Role</th>
<th>Project Team Member(s)</th>
<th>Responsibilities</th>
</tr>
</thead>
</table>
| Project Sponsor        | Dr. Jon Driver                                                                       | • Primary liaison with the project manager  
|                        |                                                                                        | • Ensure adequate resources are applied to the project |
| SCUTL Committee        | Stephen Spector (Chair)  
|                        | Diana Cukierman (Applied Sciences)  
|                        | Adrienne Burk (Arts and Social Sciences)  
|                        | Stephen Spector (Business Admin)  
|                        | Russell Taylor (Communication, Art & Technology)  
|                        | Roger Fries (Education)  
|                        | Bob Muir (Environment)  
|                        | Timothy Beischlag (Health Sciences)  
|                        | Chris Kennedy (Science)  
|                        | TBA, Undergraduate Student  
|                        | Marena Brinkhurst, Graduate Student  
|                        | Stephanie Chu, Director, Teaching and Learning Centre, Secretary, Ex-officio  
|                        | Elaine Fairey, Director, Student Learning Commons Ex-officio  
|                        | Nancy Johnston, Executive Director, Student Affairs (or designate) Ex-officio  
|                        | Maria Davis, Recording Secretary Ex-officio  
|                        |                                                                                     | • Approve and recommend project deliverables  
|                        |                                                                                        | • Identify risks/issues, potential mitigation and resolution  
|                        |                                                                                        | • Oversee issues resolution  
|                        |                                                                                        | • Liaison with the community |
| Core Team              | Chris Groeneboer  
|                        | Corinne Pitre-Hayes  
|                        | Hui Niu  
|                        | Johanne Provencal  
|                        | Stephen Spector  
|                        |                                                                                     | • Produce project deliverables  
|                        |                                                                                        | • Subject matter expertise  
|                        |                                                                                        | • Research risk mitigation and issue resolution |
| Project Manager        | Corinne Pitre-Hayes  
|                        |                                                                                     | • Develop and maintain project charter and plan  
|                        |                                                                                        | • Coordinate internal communications |

## 8 PROJECT REFERENCES

<table>
<thead>
<tr>
<th>Name</th>
<th>Description and/or Link</th>
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</thead>
<tbody>
<tr>
<td>Project website</td>
<td><a href="https://sharepoint.sfu.ca/sites/tcp/SitePages/Home.aspx">https://sharepoint.sfu.ca/sites/tcp/SitePages/Home.aspx</a></td>
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