Manual for
SMA3 Experiential Learning Metric Project

McMaster University
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1.0 Introduction

The Experiential Learning (EL) Metric Project focuses on reviewing course outlines to report on the EL metric to the Ministry of Colleges and Universities (MCU) as part of the new Strategic Mandate Agreement 2020/2021 to 2024/2025 (SMA3). A working group with representatives from every faculty as well as various administrators from the Office of Institutional Research and Analysis (IRA), Student Success Centre, MacPherson Institute for Leadership, Innovation and Excellence in Teaching, and the Registrar have been tasked with identifying EL in all 2018/2019 and 2019/2020 undergraduate courses. With the help of a sub-committee, the working group has finalized the EL typologies, their definitions, and an interpretation of the Ministry's criteria to identify courses with EL. The Ministry's criteria primarily emphasize workplace experiential learning. The EL metric is the number and percentage of undergraduate students who graduate with at least one EL course. Hence, in order to report on the metric, it is necessary to identify which of the undergraduate courses delivered at McMaster are EL according to the Ministry's criteria.

To accomplish this goal, the university hired research assistants to create a review output of the courses reviewed according to the EL typologies and Ministry's criteria based on the course outlines. There are three steps in this project, which include the collection of course outlines (data collection), review of course outlines for EL typology and review each EL type against the Ministry's criteria (meaningful data extraction), and verification with the instructors/chairs (data verification). Detailed definitions of these three steps and the overall workflow of this project is highlighted in Figure 1.0.

This manual is a useful guide for this EL Metric project. In the following sections the toolkit, the three steps, the documentation process, and tips and things to watch out for in the process are discussed. An overview of the details pertaining to each section is highlighted in Figure 1.1.

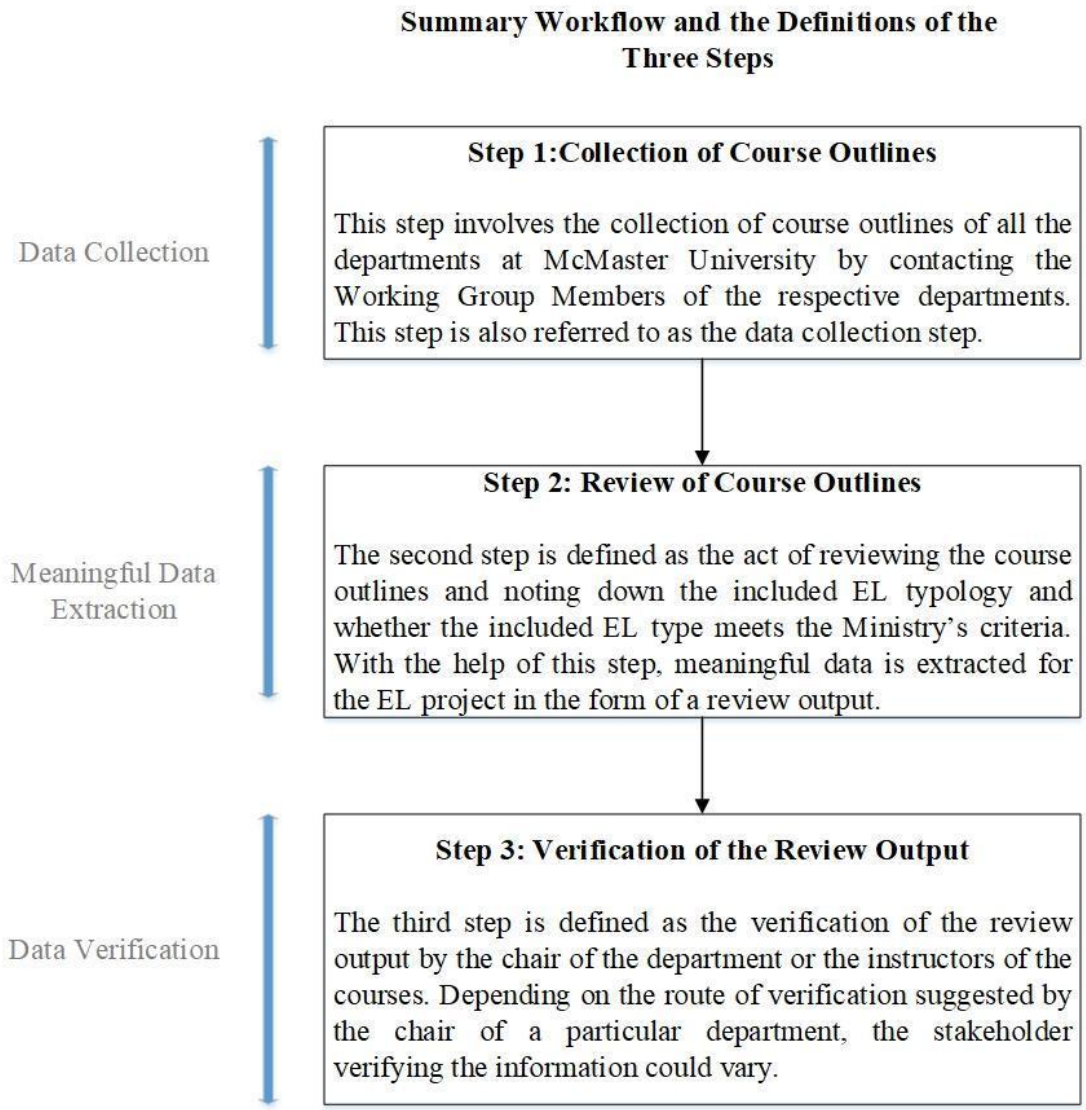

Figure 1.0 Definitions of the three steps and summary workflow

An Overview of the Sections in the Manual

Toolkit

In this section, the toolkit essential for reviewing the course outlines are discussed. It consists of three subsections:

- **EL Typologies:** This subsection consists of the complete list of typologies and their definitions formulated by the McMaster working group members. Understanding these typologies definitions is important because while reviewing the course outlines, it will help in determining which deliverable in a course meets a particular typology.
- **Ministry's Criteria:** The six Ministry's criteria are explained in this section. These are the criteria given by the Ministry of Colleges and Universities (MCU) that a course or a component of a course must include to qualify as experiential learning within the SMA3.
- **Useful Checklist for the Ministry's Criteria:** A useful checklist is created for three of the six Ministry's criteria. This checklist is used as a tool for thoroughly examining from various aspects as to whether a particular criterion is met by a course.
- **Master Excel Document:** An excel file is used to fill in the information of the review output, which will be referred to as the master excel document.

The Three Steps

In this section, the three steps of the project are highlighted and a summary of the workflow is provided to give an overview of the process. The 3 steps are discussed in the following subsections:

- **Collection of Course Outlines:** This first step of the EL project is thoroughly explained with a detailed workflow.
- **Review of Course Outlines:** The details of reviewing the course outline to see whether a course component meets an EL typology and Ministry's criteria are discussed in detail and shown in a workflow.
- **Verification of the Review Output:** The last step of this project focuses on verifying the review output by the chair of the respective department or the instructors. This is discussed in detail and shown in a workflow.

Documentation

Once the review output is verified that information is carefully recorded in the Excel file template. Tips for properly documenting the data and how to ensure consistency are highlighted in this section.

Tips and things to watch out for in the process

To help you make the most out of this project, the Do's and Don'ts, lessons learnt and the communicating strategy while interacting with chairs are highlighted here.

Figure 1.1 An overview of the sections in the manual

2.0 Toolkit

This section will provide an overview of the tools used to review, verify, and document data collected throughout the EL Metric project, as well as providing checklists to assist in determining whether a course or component of a course meets the Ministry's Criteria for Experiential Learning.

2.1 EL Typologies

These are the typologies created by the working group to describe the types of experiential learning. The list is as follows, and the definitions of each typology are included in appendix A: Typologies.

- Co-op
- Internship
- Field Experience & Placements
- Professional Practicum
- Entrepreneurship
- Simulations
- Community-/Industry-Partnered Learning
- Exchange
- Applied Research/ Project
- Work Study Experience
- Lab Courses (as a component of a course)
- Creative Practice, Performance or Exhibit

2.2 Ministry's Criteria

These are the criteria provided by the MCU that a course or a component of a course must include to qualify as experiential learning within the SMA3. Note that the Ministry's criteria focuses on experiential learning that is workplace oriented, which means that many courses that include EL more broadly may not fit within this set of criteria. The list is as follows, and the definitions of each criterion are included in appendix B: Criteria.

- Workplace or Simulated Workplace
- Authentic demands
- Structured
- Program Knowledge/Employability Skills
- Self-assessment and employer/academic assessment
- Course Credit

2.3 Checklist for the Ministry's Criteria

The following are checklists that can be used to determine if a course component that fits one of the typologies will also fulfill the six criteria set by the MCU. The checklists are for three of the

criteria that were necessary to check for: Workplace/simulated workplace, Authentic demands, and Self-assessment. The other criteria (Structured, Program Knowledge/Employability Skills, Employer/Academic Assessment, and Course Credit) are self-explanatory and did not require a checklist to determine. For two criteria (workplace/simulated workplace and self-assessment), all components must be present to fulfill a criterion. In the other (authentic demands) only one component needs to be found to fulfill the criterion. As you go through, check all that apply.

2.31 Workplace/Simulated Workplace Checklist

Must check all three of the following to count as a workplace or simulated workplace.

- ❑ The student fulfills a role that exists in the workplace, and/or there is a client/managerial/investor/customer relationship between the student and instructor
- ❑ The project requires specialized infrastructure, and/or specialized knowledge
- ❑ The project deliverable is provided to the instructor in a manner that reflects the workplace

2.32 Authentic Demands Checklist

Must check at least one of the following to fulfill the requirements of this criterion.

- ❑ The expectations of the work to be done are similar to what would be expected of an employee in the field holding a similar position
- ❑ The project is meant to solve or work through a problem that exists in the sector
- ❑ The project meets conditions that exist in the relevant sector

2.33 Self-Assessment Checklist

Must check all three of the following to count as self assessment based on the definition agreed upon for McMaster

- ❑ The student has either met with the instructor/teaching assistant to discuss their experiences, or has written a reflection about their experiences
- ❑ The student reflected on what they did and how the experience will shape the way they approach similar situations going forward
- ❑ The student reflected on how their previous academic experience helped (or did not help) them in their experience

2.4 Master Excel Document

The IRA provides the research assistants with an excel file to fill in the information of the review output, which will be referred to as the master excel document. It includes important information about the courses such as the code, name, number of sections, and term it occurred, as well as

space to include all necessary information to be obtained through the review and verification process. More information about it will be provided in the Documentation section.

These tools will help in the review, verification, and documentation of data collected throughout the EL Metric project. The next section will give specific instructions on how to collect the course outlines, review the outlines, and verify the review output.

3.0 The Three Steps

Having just gone through the tools available to the research assistants to complete the project, the following section explains in detail the steps of the project and how to complete them. An overview of the workflow for the three steps in the EL project is shown in Figure 1.2. The detailed explanation of the collection, review, and verification steps are provided in the following sections.

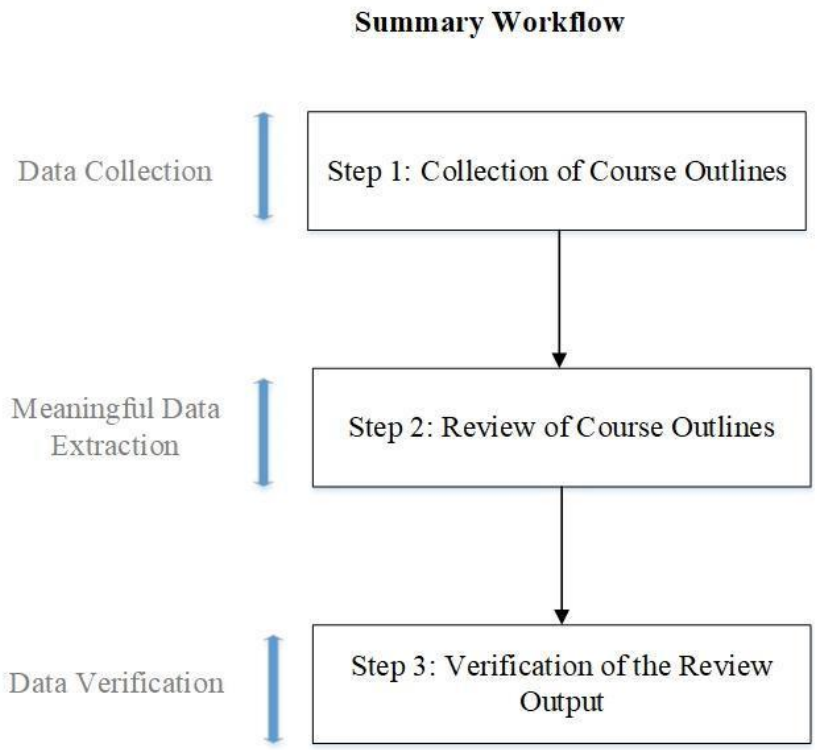

Figure 1.2 Summary workflow of the EL Metric project

3.1 Collection of Course Outlines

The collection of the course outlines is the first step of this project. The workflow of collection of outlines from reaching out to the curriculum chairs to receiving them is highlighted in Figure 1.3. In this step, the research assistant's role is to reach out to the designated faculty representatives of the working group for the collection of course outlines. Using the email template shared in appendix C: Collection Email Template, the research assistant emails the working group member of the respective departments. The research assistant might receive either one of the two responses. The faculty representative facilitates in collecting the outlines and shares them with the research assistant OR the faculty representative connects the research assistant with the administration team of the respective department/faculty. Every department/faculty has their own way of storing the course outlines. Some of them are available on the departmental/faculty website and others are stored differently. Overall, there are four ways to access the course outlines:

1. Online Database (such as MacDrive)
2. Departmental or Faculty Website
3. Contact the Administration to help with collection of outlines from instructors
4. Contact the Instructors after getting approval from the Chair of the Department

Once the research assistant receives the course outlines, the research assistant proceeds to the review step. However, there may be cases where the research assistant does not receive the complete set of outlines at once. In that case, it is recommended to review the outlines that are available and review the rest when they have been received. This will make efficient use of time.

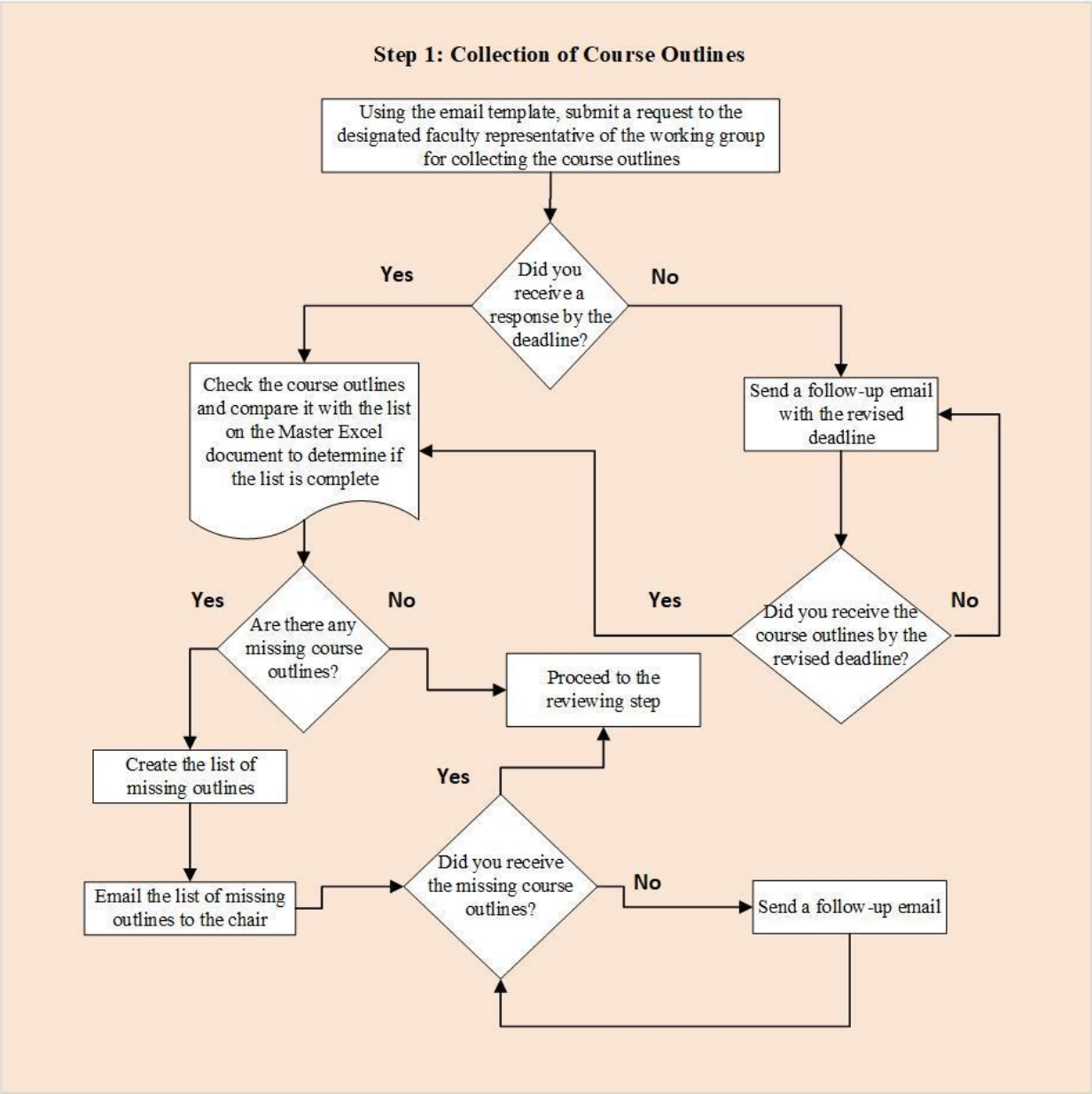

Figure 1.3 Step 1: Overview of the Collection of Course Outlines

3.2 Review of Course Outlines

Reviewing the course outlines is the second step of this project. First, the research assistant reviews the course outline to see whether a course component meets a EL typology. If the course meets no EL typology, the research assistant then records "No EL Typology for Experiential Learning". On the other hand, if the course contains one or more typology(ies), the research assistant will record the name of the typology(ies) and determine how many of the Ministry's criteria it meets (see Figure 1.4 for the overview). The detailed workflow of reviewing whether the course contains EL typologies and whether the EL type that exists meets the Ministry's criteria is highlighted in Figure 1.5 on the next page. During this stage, the research assistant can document the relevant information either on a word document or a simplified excel document (depending on which one is easier to read/transfer to the master excel document). See appendix D for a sample template on word document that you can use or modify if need be.

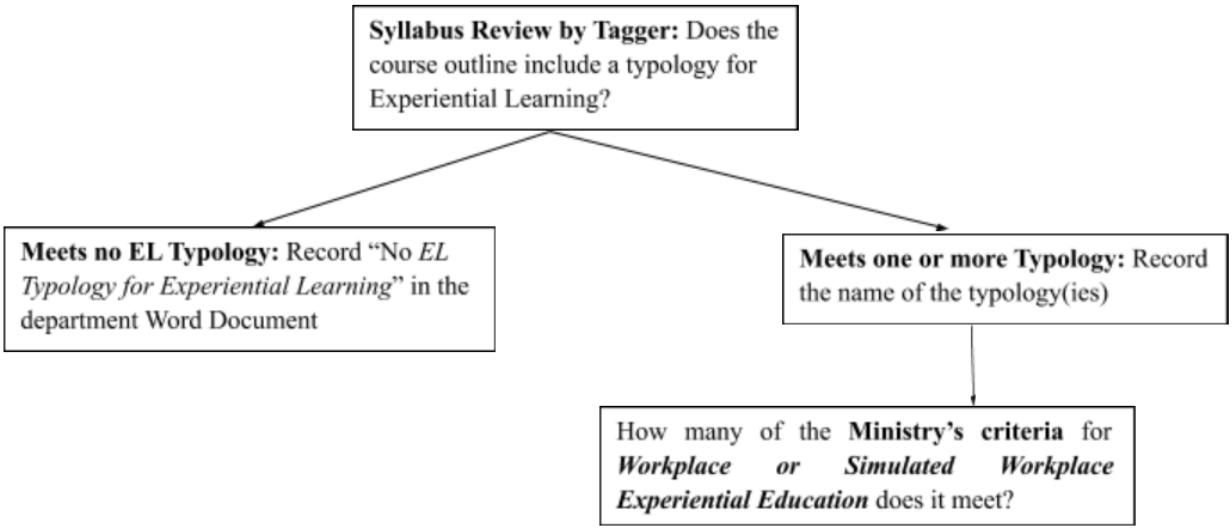

Figure 1.4 Step 2: Overview of Reviewing Course Outlines

Once the research assistant finishes reviewing the course outlines, the research assistant proceeds to the verification stage. However, there may be cases where the research assistant does not receive the complete set of outlines to review at once. In that case, it is recommended to begin verification once a batch of the outlines for the department have been reviewed. Once the research assistant receives the missing course outlines and reviews the remaining courses, the research assistant can then contact the curriculum chair again to get the rest of the review output verified.

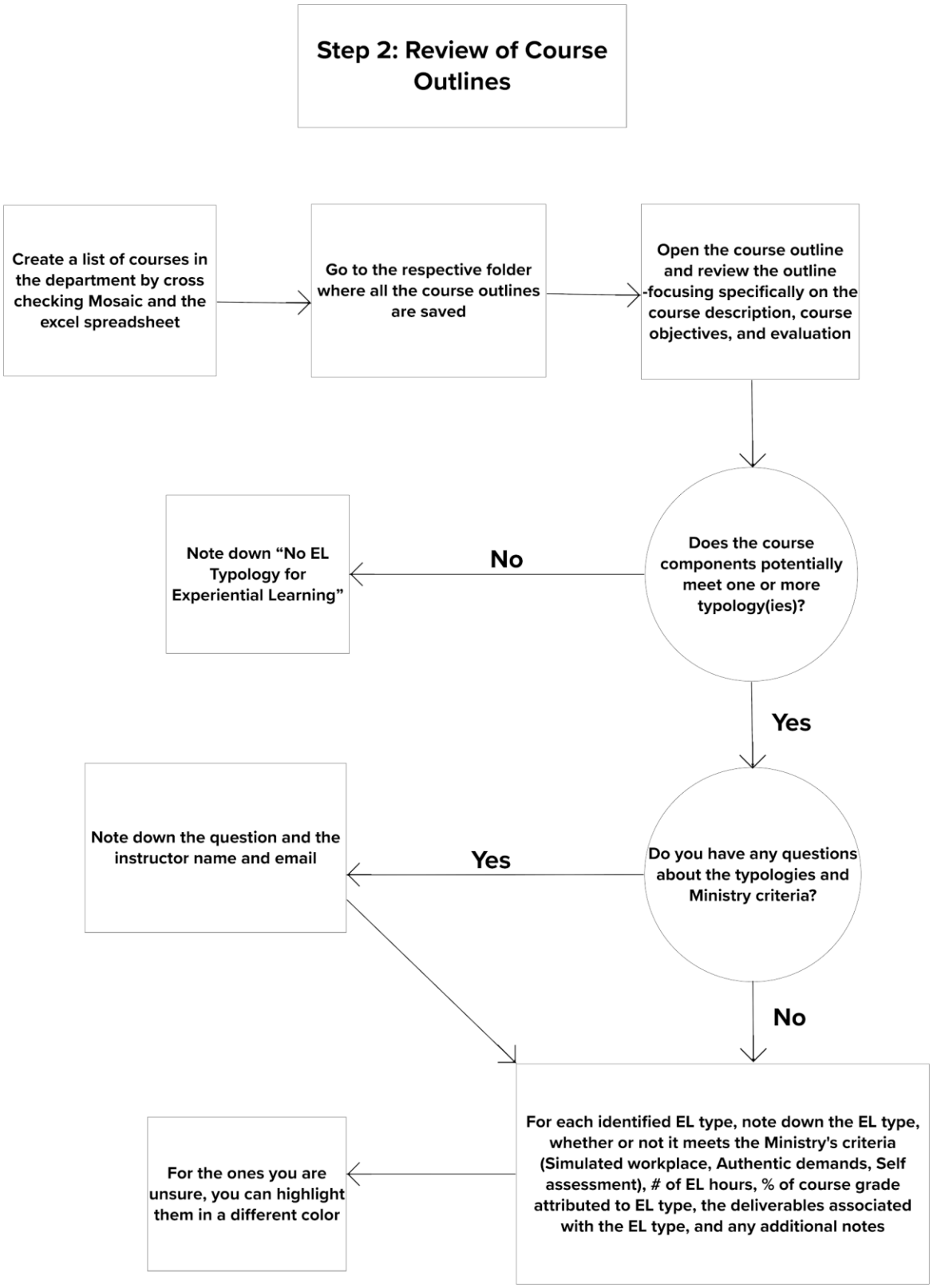

Figure 1.5 Step 2: Detailed Workflow of Reviewing Course Outlines

3.3 Verification of the Review Output

This section explains the process for verifying the review output from the review process. Figure 1.6 shows an overview of the process regardless of the method of verification.

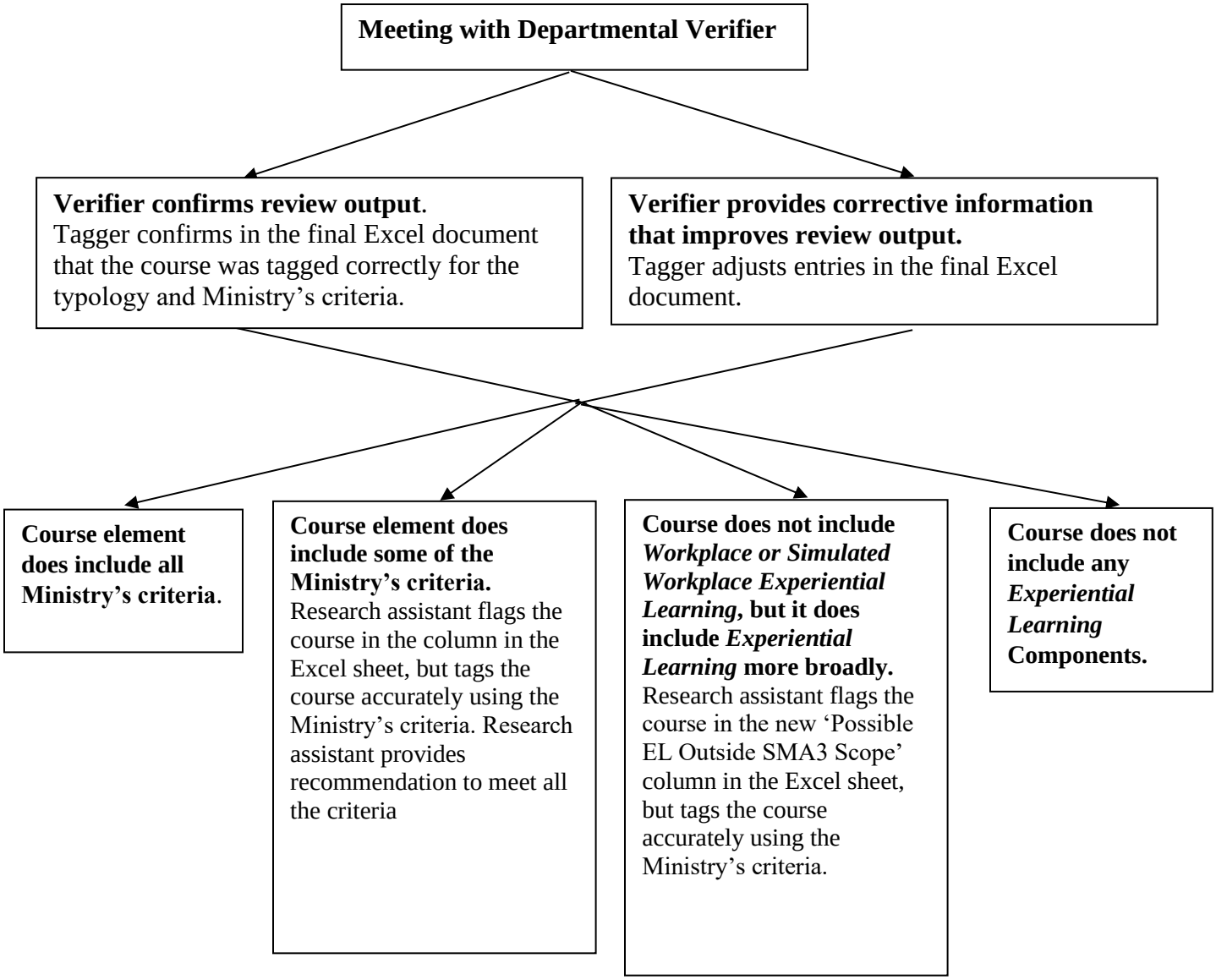

Figure 1.6 Step 3: Overview of Verification

During verification, the curriculum chair will either confirm the research assistant's assessment or will provide corrective information to the research assistant, which may change the recorded information on the course. The breakdown of how to reach out to the chairs and get the data verified

is written out in two sections. The first explains how to verify the data when meeting with the chairs in person, or via phone/video chat. The second explains the process for verification via email.

3.31 In Person/Phone/Video Verification

This section describes how to verify courses in a department in person or through phone or video chat.

When the research assistant is ready to verify the review output, the first step is to reach out to the faculty contact from the working group to inform them of this. They will need to be copied on the initial email requesting a meeting for verification, as well as any follow up. They can also be called on to assist the research assistant if they have reached out several times to request a verification meeting and have not received a response.

To begin the research assistant will send an email to the curriculum chair (from a list provided by the deans/faculty contacts). An email template has been included (appendix F) that can be used or modified if need be. At this point the chairs should all know what the project is about and why it is happening, so being contacted for verification should not be a surprise. However, there may have been some changes in who the chairs are, so some explanation of the project and why they are being asked for a meeting may be necessary. Appendix E includes the list of contacts for the 2019/2020 school year, so if a new chair is unsure about the project, they can be provided with the name of the previous chair who verified the 2018-2020 courses.

If the chair wishes to verify by email, please see the next section. Here we will go over how to verify either by phone/video chat or in person as they are very similar procedures.

When meeting with the chair, bring along a copy of the word document or excel file (whichever you choose to use to document the data) for both of you, along with a copy of the EL typologies and Ministry's criteria. If this is a phone or video meeting, email them a copy of those documents instead, at least the day before the meeting. Begin by asking them if they know what the purpose of the meeting is and what they know about the project. As stated above, most of them should know what this is for as they will have met with the previous research assistants. However, there may be some turnover in the department, or they may have forgotten some details and an explanation will be required. The same talking points from the letter sent out by the Associate Vice Provost and the Associate Vice President IRA (appendix G) can be used, but explaining in a more relaxed way using plain language is recommended (see section on communication strategy with chairs for example). After this, proceed to the verification itself.

While there are different ways the courses could be organized, it is recommended to go through the individual courses by term in ascending order of the course code, as that is mostly how they will already be organized in the master excel document that will be supplied and filled out with all the information in the end. Go through each course, say the code, the name, and the identified EL type

(if any), and ask if they agree with your recorded information. When there is a course where a component was not described in enough detail to tell if it is experiential or if it meets all of the Ministry's criteria, make sure to ask specific questions, such as:

> "As I was reading through the outline, it was clear that this field experience is an EL component, but there is no mention of any self-evaluation or reflection. Do you know if the assignment includes one?"

They may be able to answer, but it is also possible that when asking very specific questions about assignments they may not know the course well enough to answer. In this case they may offer to contact the course instructor, or the research assistant can offer to ask the instructor themselves. There is no real way to know which is better, as it depends on the instructor as to whether they will be more likely to respond to the research assistant or to their colleague.

At the end of the meeting, thank them for their time. If there are any follow up emails to send to specific instructors, it is recommended to do that the same day if possible, so everything is fresh in memory. It is also a good idea to copy the chair on the email, so they know it has been sent.

This section has described how to verify the review output in person or through phone/video meetings. The next section will describe how to verify the review output when the chair wants to verify over email instead.

3.32 Verification via Email

There were often cases where the curriculum chairs of some departments opted for verifying the review output via email. The workflow of verification of review output is shown in Figure 1.7.

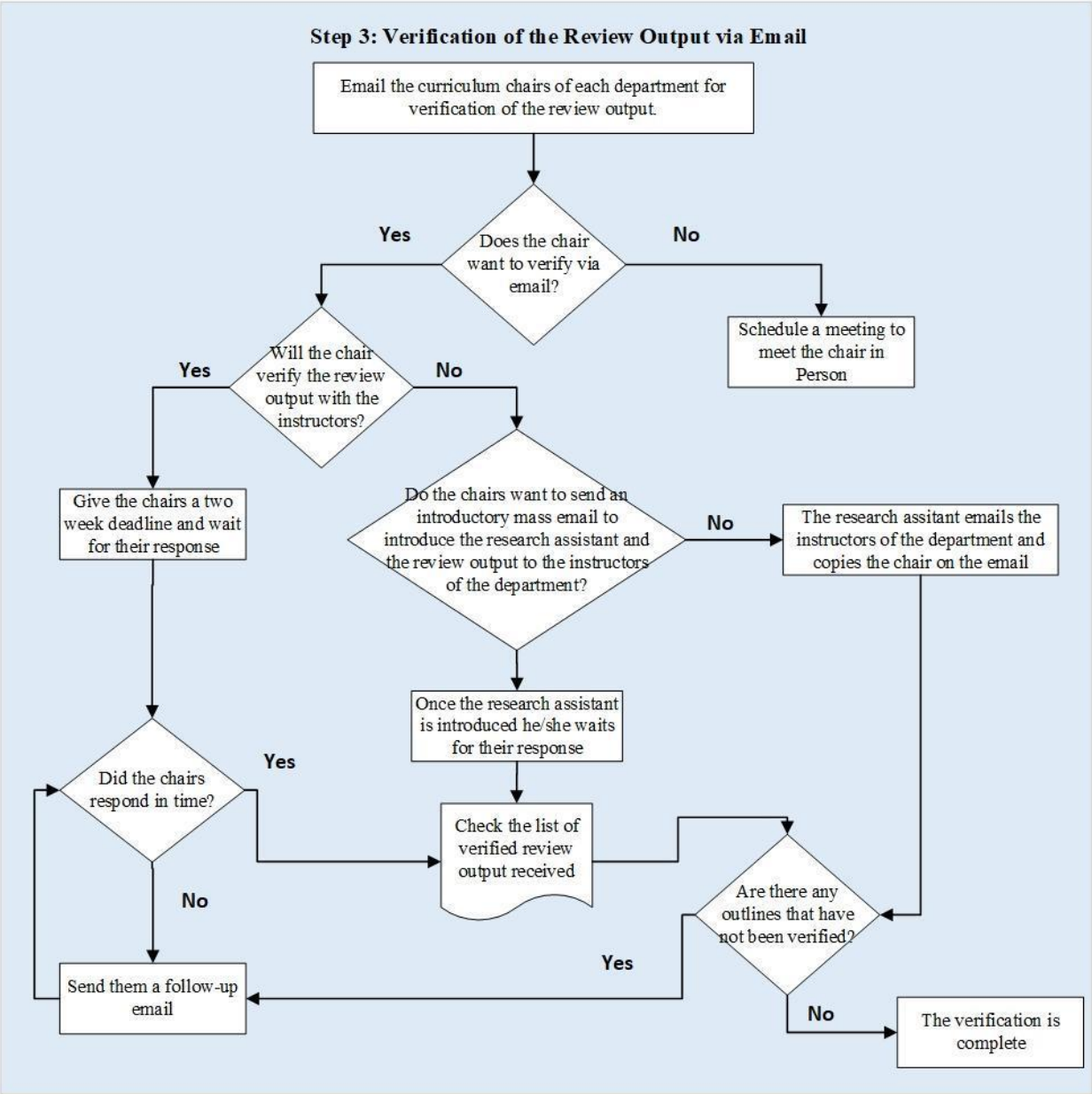

Figure 1.7 Step 3: Verification of the review output via email

After verifying the review output, the verified information needs to be recorded on the Master Excel document. The next section focuses on the documentation process.

4.0 Documentation

Once the data has been verified by the curriculum chair or instructors, the data must be compiled in the master excel document, where it will be organized, stored, and analyzed. This section will include tips for properly filling in the document, so that it is done consistently and completely.

4.1 Tips for Properly Documenting the Data

There may be cases where a deliverable in a course does meet a particular EL typology, but only some of the Ministry's criteria are met. In such a case, if a course is missing some of the Ministry's criteria, then this can be noted in the "recommendations to meet MCU criteria" section. For instance, if a course meets five of the six criteria and suppose only the "self-evaluation/assessment" criterion is missing, then, the comment "please add self-evaluation" can be noted in the recommendations section.

4.2 How to Ensure Consistency?

i. Use the same abbreviations throughout the documentation process to avoid confusion. For instance, when using the abbreviation N/A please ensure that 'N/A' and 'NA' are not used interchangeably. It is best to use the same format to refer to an abbreviation throughout the documentation process.
ii. In the column for number of hours, try to get a number of hours per term, as opposed to a percentage of total hours.

4.3 Abbreviations

i. N/A = not applicable
   Used when the box does not apply to the course. For example, when the course does not include any experiential learning components, "N/A" is noted in the boxes for "# of EL hours, % of course grade, recommendations to meet MCU criteria, EL deliverables".
ii. U/A = unavailable
   Used when the information is not available. For example, if the instructor/chair does not know the exact hours or % of course grade attributed to the EL type, "U/A" is noted in the box.

5.0 Tips and Things to Watch Out for on the Process

The previous sections focused on discussing the essential components of the project. To make this project a fruitful experience, the Do's and Don'ts, lessons learned, and the communication strategy used by the previous research assistants are provided below. Most of the tips and things to watch out for on the process are addressed in this section. However, if a situation arises where the research assistant is unable to find an answer from the following section, then, they are welcome to use their own discretion or consult the working group members.

5.1 Do's and Don'ts

In this section, the essential tips on what should be (Do's) and should not be done (Don'ts) in the process are discussed below.

5.11 Do's

I. **Share the preliminary output with the chairs prior to the meeting**
   Before going to the verification meeting, make sure that the preliminary review output is shared with the curriculum chair of the respective departments in advance of the meeting. This will allow the chair to review the review output prior to the meeting and it will speed up the verification process.

II. **Share the typologies and Ministry's criteria with the chairs when you send out the preliminary review output**
   Since the preliminary review output consists of the typologies and Ministry's criteria, it is best to share the file that consists of the typologies and Ministry's criteria definitions with the chairs. It will prove to be useful for helping the chairs understand the details pertaining to each typology and Ministry's criteria.

5.12 Don'ts

I. **Make Assumptions**
   Anything can happen when meeting with chairs or reaching out to instructors. Some chairs will know all of the classes inside out, others may not know anything about the specifics of the courses in their department. Some instructors will be fine if their course does not fit within the Ministry's criteria for EL, while others may get offended and question the review or why these criteria were chosen. Be open and ready for whatever may happen.

II. **Make suggestions regarding pedagogy**
   Chairs and instructors might sometimes ask for your opinion on whether or not they should include self-assessment or make other changes to the course. Politely let them know that you are not an expert in pedagogy, and that it should be a departmental decision when making such changes. If they have more questions related to pedagogy, refer the

chair/instructor to the MacPherson Institute for Leadership, Innovation and Excellence in Teaching to answer their questions.

5.13 Lessons Learned

I. **While emailing the curriculum chairs always copy the respective working group member on the email**
This is extremely important especially when you initiate contact with the curriculum chair of a particular department, because this will ensure that the working group member is aware that you have initiated contact with the chair. There will be cases where you may not get a response on the very first email and if the working group member remains copied on the email, they may facilitate this.

II. **Create a sense of urgency in your email in a polite way**
After sharing the preliminary review output with the chairs, it is absolutely essential to provide them a two-week deadline in a polite manner. Ensuring timeliness of this project is absolutely crucial for this project. If a chair does not respond in a timely manner, then send them a polite follow-up email. There were cases where some chairs did not respond for months. In such a case, please ensure that this is brought to the attention of the respective working group member who will facilitate in expediting the verification process.

III. **Try not to send emails to the curriculum chairs on a Friday**
Friday is the end of the week and a time when everyone is looking forward to the weekend. It is highly recommended not to send emails on a Friday, as there is a very minimal chance of getting a response from the chairs on this day. Another problem is that once the weekend arrives, the chairs inbox is possibly flooded with more emails and by the time chairs open emails on a Monday your email may go unnoticed.

5.14 Communication Strategy while Interacting with Chairs

I. **Being clear that the typologies and Ministry's criteria are geared toward Workplace or Simulated Workplace Experiential Learning**
Some of the chairs and instructors might get offended when they see that their courses did not get a typology even though they think that their course is quite experiential. In this situation, it is important to stay calm and polite but clearly articulate that the typologies and Ministry's criteria are predefined by the Ministry and the working group and are geared toward Workplace or Simulated Workplace Experiential Learning If the course includes experiential learning more broadly, the research assistant can consult the chair/instructor to note down "possible EL outside of SMA3 scope". If the chair/instructor has any feedback about the typologies and Ministry's criteria, you can offer to note them down and bring it up during the SMA3 working group meetings.

II. **Being clear about what this project is for and setting deadlines**
Some of the chairs and instructors might have never heard of the project before (even though most of them should have after the review output being verified in 2019/2020.) As

such, it is good to state what the project is for in your initial email with the chair/instructor and to restate it at the beginning of your meeting. In addition, it is important to set reasonable deadlines for verifying with each chair/instructor. Typically, the chairs will say that they will follow up with the instructors and send you the verified review output after. However, the chairs have multiple priorities and can forget about the project. As such, it is important to set a reasonable deadline (for example, two weeks after your initial meeting) and to follow-up with the chair/instructor if you still have not heard back by the deadline.

III. Always be respectful but constantly remind the chair/instructor about the definitions of the typologies and Ministry's criteria

When communicating with the chairs/instructors, they might state that they believe that the course component meets the typology or the Ministry's criteria. However, it's possible for them to misunderstand or miss a part of the definition. As such, if what the chair/instructor says clearly contradicts what you think/read from the course outline, you can try and clarify by restating the definitions of the typologies/Ministry's criteria and asking the chair/instructor whether or not they think the course will meet the definition. However, if after the discussion, you still strongly disagree with the chair/instructor, then you can note the course down as stated by the chair/instructor and make a note "contested" in the comments section of the spreadsheet.

IV. Example of explaining the project to the chairs/instructors in person/over phone/video chat

"We are creating an inventory of the undergraduate courses to see which courses include some form of experiential learning. While we are making note of all forms of experiential learning that met the typologies outlined in the typology document, we are specifically looking for how many courses also include the criteria that the MCU has outlined, which are workplace oriented criteria such as the course component taking place in a workplace or simulated workplace and has authentic demands (meaning the requirements of the assignment are like what a person doing this for a job would be expected to do). Part of the SMA3 mandate is for every undergraduate student to graduate with at least one course with experiential learning. So this means that, at least for now, we are not trying to maximise the number of courses or make every course have EL.