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MEMORANDUM

ATTENTION: Senate

TEL

FROM: Peter Keller, Vice-President, Academic and Provost, and Chair, SCUP

RE: External Review Mid-Cycle Report for the Beedie School of Business (SCUP 18-05)

A handwritten signature in blue ink, appearing to read "Peter Keller".

DATE: January 12, 2018

TIME

At its January 10, 2018 meeting, SCUP reviewed the Mid-Cycle Report for the Beedie School of Business which resulted from its 2014 external review. The report is attached for the information of Senate.



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MEMORANDUM

ATTENTION: Peter Keller, Chair, SCUP	TEL
FROM: Wade Parkhouse, Vice-Provost and Associate Vice-President, Academic	
RE: External Review Mid-Cycle Report for the Beedie School of Business	<i>W. Parkhouse</i>
DATE: December 13, 2017	TIME

The External Review of the Beedie School of Business was undertaken in March 2014. As per the Senate guidelines, the Unit is required to submit a mid-cycle report describing its progress in implementing the External Review Action Plan. The mid-cycle report, together with a copy of the Action Plan approved by Senate, and the mid-cycle report on the Unit's assessment of its Educational Goals are attached for the information of SCUP.

c: Ali Dastmalchian, Dean, Beedie School of Business



MEMORANDUM

To: Glynn Nicholls, Director, Academic Planning and Quality Assurance
From: Ali Dastmalchian, Dean
Date: November 30, 2017
RE: Beedie Mid-Cycle Review Report & Documents

Attached please find the Mid-Cycle Report for the Beedie School of Business which details our progress with the Action Plan stemming from the 2014 External Review. The assessment of our Educational Goals is also attached.

External Review Update for the Beedie School of Business

Action	Progress Made
1. Programming	
1.1.1 Undergraduate	
<p><i>Recommendation: Do not expand student numbers</i></p> <ul style="list-style-type: none"> • Beedie has adopted a steady state target of 3,600 undergraduate student FTEs. It also has set an upper limit of 30% international students. This number of students has been relatively stable for the past 3 years and this target has been accepted by the University. 	<p>Although we have seen modest growth in our Activity Full Time Equivalents (AFTE) we have held the line on the size of our BBA program and not expanded our Program Full Time Equivalents.</p> <p>We are below the ceiling of international students with a current percentage of 28%.</p>
<p><i>Recommendation: Analyze sufficiency of faculty numbers in undergrad program</i></p> <ul style="list-style-type: none"> • Rather than reviewing the undergraduate program regarding sufficiency of faculty, we have reviewed this issue at the faculty level. Results are reported in the Faculty Renewal section. 	<p>Sufficiency of faculty is addressed at the aggregate level in the renewal section.</p>
<p><i>Recommendation: Consider support for international students</i></p> <ul style="list-style-type: none"> • Regarding meeting the needs of international students - the Faculty has requested a change to the faculty allocation model (FAM) that would direct more of the premium fee paid by international students to Beedie, where most of the services are delivered. These services are provided at the Faculty level and include: <ol style="list-style-type: none"> a. Reducing the size of core courses. E.g. the BUS 360W Communication core course reduced from a max of 60 to max of 48, thus enabling more one-on-one time between the students and the instructors. This has improved the success rate of students with communication issues. b. Adding courses. The Faculty has added a first-year Business Foundation Program to address communication skills and to better prepare all students for the curricular and co-curricular opportunities provided by Beedie. 	<p>We have made significant progress in increasing the attention and support to international students' communication skills. We have reduced the average class size in BUS 360W to 36 from 60 and reduced the class size in BUS 303 (ethics) from 90 to 70 while simultaneously increasing the Teaching Support by 25%.</p> <p>With CELLTR we have added a mandatory team-taught entry level writing and critical thinking course (BUS217W) and arranged for a required business communication course in the pathway program at FIC (BUS 216), our international feeder school.</p> <p>Although we did not achieve the success that we expected with our pilot initiative 'Let's Talk Business' and have discontinued it, we have added additional writing mentors and one of our faculty members is part of a university wide strategy to reexamine communications.</p>

<p>c. Adding Services. The Faculty has added many support services for international students including a non-credit, on-line Business Writing Essential course, developed in partnership with CODE, to support writing development; a "Let's Talk Business" speaking workshop developed in conjunction with the Student Learning Commons to support oral communication; a Business Mentors Program to provide senior mentors to first- and second-year students; a standardized writing assessment for all students (domestic and international) developed in conjunction with the Centre for English Language Learning, Teaching and Research (CELLTR). We have also invested in a two-day professional development of our advising staff on issues related to international students provided by the Faculty of Education.</p>	<p>We also began a fundamental review of our core curriculum supported by our Undergraduate Core Curriculum Committee.</p> <p>We have extended our developmental measurement of writing competency assessment and in the next year will further contextualize this to business.</p>
<p><i>Recommendation: Examine opportunities for innovative teaching</i></p> <ul style="list-style-type: none"> Blended learning models will be explored for future deployment when faculty levels are more appropriate. We will continue to work with SFU IT to improve the communication capability across campuses. 	<p>As a commuter campus, we have intentionally focused on in-person rather than distance education in our core. However, technology and remote access continue to be areas of development and support. BUS312 (Finance) has a comprehensive online and video self-study and reinforcement library and we are an early adopter of participation tools such as PollEverywhere and engagement vehicles such as Riipen (www.riipen.com). Canvas, the university's LMS is widely adopted.</p>
<p>1.1.2 Graduate</p>	
<p><i>Recommendation: A "breather" on starting new programs</i></p> <ul style="list-style-type: none"> Beedie will not add any new graduate programs in the next 2 years unless they come with significant additional resources to help address the current funding deficit. 	<p>We have not launched any new MBA or MSc programs. We launched a Graduate Certificate in Science Commercialization (15 students) in 2016 and ran one cohort of the North West EMBA (2016-17) which is a regional EMBA with 25 students. These were strategic programs focused on core elements of our school's strategy and therefore deemed as important and timely opportunities to pursue.</p>
<p><i>Recommendation: Reduce silos and look for opportunity to consolidate</i></p>	<p>We have not reduced the number of academic directors in the graduate portfolio. Instead, we have increased the number of limited term and continuing lecturers/Senior Lecturers operating as academic</p>

<ul style="list-style-type: none"> The Administrative structure will be rationalized to avoid the situation where research professors are administering individual programs. Lecturers will be used, where possible, to administer a portfolio of programs. A concerted focus on student recruitment in the next 2 years will be followed by a period of reflection and, if underfunding continues, consolidation of programs. 	<p>directors in the graduate programs. These individuals have provided excellent academic/administrative skills.</p> <p>Over the past 3 years, we have significantly increased MBA and EMBA class sizes demonstrated with a 14% increase in AFTE's over Fall 2016 levels in Beedie Specialty Graduate Programs in Fall 2017.</p> <p>Funding remains an issue and the need for increased numbers of faculty suggests that a growth in revenues will be needed to meet accreditation standards. The graduate programs will likely participate in this revenue increase.</p>
<p><i>Recommendation: Consider moving the Surrey Part-Time MBA to Segal</i></p> <ul style="list-style-type: none"> The Surrey part-time MBA will be monitored with respect to compliance with AACSB requirements and fit within the overall portfolio of graduate programs. 	<p>We reconsidered the elimination of the Surrey part-time program. A decision was made in 2015 to wait for one more recruiting cycle before removing the program from Surrey. Two subsequent recruiting cycles have shown significant growth and the current cohort of over 40 students indicates strength in the Surrey part-time recruiting. We have been able to increase the percentage of faculty teaching in the program, but a constraint of faculty resources means the program has still not yet reached the levels suggested to meet for accreditation requirements. This still places the Surrey programs at risk.</p>
<p><i>Recommendation: Consider increasing flexibility in the program</i></p> <ul style="list-style-type: none"> Flexibility within and rationalization across programs will be pursued. 	<p>As a part of the Build a Better Beedie (B3) process, the grad programs are embarking on a project to reconsider graduate program learning goals. One of the outcomes of this process may be increased flexibility or rationalization of programs but that will be a process that takes several years to accomplish.</p>
<p><i>Recommendation: Participate in Global rankings as EMBA improves</i></p> <ul style="list-style-type: none"> The EMBA is not an appropriate program to use to participate in rankings since students are not entering the work force after the program. The MBA program is more appropriate and will be considered. In addition to the above - Beedie has requested an increased share of the tuition revenue from the Community and Corporate EMBA programs including the EMBA in Aboriginal 	<p>The EMBA is not an appropriate program to use to participate in rankings since students are not entering the work force after the program. The MBA program has two elements. Part-time programs (MOT and Surrey) include students with existing high-level employment. The full time MBA is most likely candidate for rankings. It is currently 45% international students (which demonstrates global awareness) but the program is not producing placements that will make SFU competitive in the global rankings. The recognized low-</p>

<p>Business and Leadership and the EMBA in Northwest BC. The programs incur high costs to design, market and deliver but are strategically important to SFU and their respective communities. Increased revenues would allow Beedie to ensure the sustainability of these programs.</p>	<p>wages in the Greater Vancouver Regional District are a large part of this challenge.</p>
<p>2. Research</p>	
<ul style="list-style-type: none"> The research culture is strong within Beedie. We will continue to support it through our two mentor programs (Write Clubs for those people preparing articles and Brown Bag lunches to share research strategies and innovations) and helping faculty apply for research grants (by having an experienced grant facilitator). 	<p>We continue to support the strong research culture in Beedie through mentoring programs, research events and grants facilitation. We are currently expanding research seminar events hosted by each Area group to promote research collaboration within and across Areas.</p>
<ul style="list-style-type: none"> As tri-council grant funding acceptance rates fall, we will continue to look for alternate sources of research funds. 	<p>Most of our research funding continues to come from Canada's research councils. Our researchers are increasingly able to take advantage of the expanded spectrum of funding programs which SSHRC introduced in 2011 as several have applied to acquire funding through Partnership Development Grants and Partnership Grants programs. We consider this to be an area for potential growth for our faculty. Beedie scholars have continued to achieve success rates above the national average in SSHRC competitions.</p> <p>In addition, we continue to explore alternate sources of funding. Private sector organizations, for example, support research through sponsorship of our Research Centers. We believe company sponsorship (e.g. foundations, not-for-profit organizations) represent the strongest area of potential growth. This type of sponsorship has averaged \$152,200 per year between 2011 and 2016, and could grow as we are working to align Research Centers more strongly with Beedie's programs and overall research strategy.</p>
<ul style="list-style-type: none"> From the external review report: "the university research services need to be improved and run more efficiently." This is a particularly important issue for Beedie, since our faculty are exploring non-traditional ways of funding and administering their research programs. We continue to 	<p>Several new senior managers have been put in place in SFU Research Operations, with an explicit goal of "better and more timely service for researchers from all support offices." We continue to offer input and support for their change efforts.</p>

<p>challenge the University to support rather than block these initiatives and look forward to assisting them to put new processes and policies in place.</p>	
<ul style="list-style-type: none"> The PhD program will stay small, with a senior supervisor for each student being identified at an early stage. 	<p>The PhD program is currently small, with 16 students, and with senior supervisors for each student being identified at an early stage. A taskforce has been created this fall to consider redesign of the program to enhance financial and other support for students and program outcomes.</p>
<p>3. Engagement and Administration</p>	
<ul style="list-style-type: none"> The Marketing Department will transition away from print toward the development and deployment of digital assets. A video unit will be developed and used to support recruitment of students and engagement with the community. 	<p>A Senior Producer and a videographer have been hired in 2015. The school has since developed a significant bank of video content ranging from alumni profiles, guest speaker talks, events, and interviews. Videos are regularly used in marketing, social media, advertising, and engagement activities. A selection of guest speaker videos are featured on the Ideas@Beedie website, the school's content portal serving the business community by sharing content themed around the school's strategic pillars such as Innovation & Entrepreneurship, International, and Sustainability.</p>
<ul style="list-style-type: none"> External Relations will refine and ensure that Beedie Community, its software systems to track our external engagement partner, is meeting the school's needs. 	<p>Moved from SFU servers to vendor hosted to allow for quicker response times to address issues and speed up customization. Upgraded to the newest version of software that provides new features and allows more flexibility in tracking user engagement. Currently working in Beta mode in order to implement enhanced feature requests and automation. Met with various Beedie units to standardize business process flow and tracking of user activities.</p>
<ul style="list-style-type: none"> Engagement programs such as Mentors in Business (300 pairs) and Speakers on Campus (300 per year) continue to be a keystone of community engagement. We will implement Career Talk, an online matching system for students, alumni, employers and friends of Beedie to connect with each other for informational interviews. 	<p>Mentors in Business continues to be on track with the addition of new training opportunities for mentors and a revised orientation for mentees focusing on SMART goal setting. Speakers on Campus has expanded to include not only guest speaking opportunities but other experiential opportunities such as one-on-one interviews with local business leaders, salary negotiation simulations, and mock networking simulations. CareerTalk was implemented but, due to technical issues, was shut down temporarily. It is expected to relaunch in November 2017.</p>

<ul style="list-style-type: none"> Both Graduate and Undergraduate Career Management Centres will explore how to automate and streamline basic services such as resume writing and will develop online career educational resources in order for advisors to focus on higher value services and increase capacity. 	<p>The Graduate CMC has implemented VMOCK, an online tool to assist with resume writing, and has developed 2 online workshops (resume writing and cover letter development) on CANVAS. Plans are in place to launch two more online workshops in 2018.</p>
<ul style="list-style-type: none"> Undergraduate Career Management will continue to expand its specialty programs such as Investment Banking Prep, Consulting Prep, Sales and Marketing Programs, etc. in order to enhance career preparation and marketability of students. 	<p>The Undergraduate CMC has evolved career interventions for all BBA 3600+ students. Business Career Passport is now a first-year requirement in including 6 workshops which a hybrid (online & in-person) flipped classroom model and assessment of deliverables. In BUS 343 Introduction to Marketing, we host a Personal Branding Event in which all students engage in mock networking & interviews with industry professionals to receive feedback. We have hosted/supported specialty programs such as Investment Banking Prep program, CPA Prep, Company tours, Management Consulting Career Prep Program, Beedie Urban Development Program, Company tours etc.</p>
<ul style="list-style-type: none"> SFU is celebrating its 50th Anniversary starting in September 2015 and we will be hosting a special series of student and alumni events to celebrate and create more engagement. 	<p>We hosted over 50 alumni, donors, faculty, students and staff at SFU's 50th Anniversary event. We hosted a series of alumni and student events branded with the 50th Anniversary, including the 15th Anniversary of the Management of Technology MBA, and alumni socials in Vancouver, Toronto and Shanghai.</p>
<p>4. Working Environment</p>	
<ul style="list-style-type: none"> We need to collaborate and communicate more across our 3 campuses, and will participate in the university's "virtual campus" initiative. 	<p>Beedie has invested its own resources in creating video conference rooms between its Burnaby, Surrey and downtown campuses, including the new Charles Chang Innovation Centre building. We were not able to benefit from the University initiative.</p>
<ul style="list-style-type: none"> We will continue to request support from SFU facilities to improve the technology in our Segal classrooms to bring them up to standards set by comparable Canadian graduate business programs. 	<p>We are currently working (as of August, 2017) with the Executive Director of SFU Vancouver on a 5-year capital plan project charter to apply for funds to pay for refurbishment and upgrade of all teaching and public spaces at Segal in order to maintain our brand reputation with our premium graduate programs. This includes updating our AV and classroom technology.</p>
<p>5. Accreditation</p>	

<ul style="list-style-type: none"> A careful monitoring of faculty teaching arrangements for 2014/2015 will result in as many research faculty teaching in the graduate and undergraduate programs as possible. Our statistics for this year are critical for continuing our accreditation. 	<p>We received full reaccreditation from AACSB in fall of 2015 and from EQUIS/EFMD in 2017 indicating that the ratios were acceptable. They are fairly robust for most of our graduate programs (except EMBA ABL and NW where a large amount of teaching is done by outside faculty), and the ratios for the BBA program were also at acceptable levels. However, overall the student/faculty ratios at Beedie need to be substantially improved.</p>
<ul style="list-style-type: none"> We will develop a solid plan for future recruitment of faculty that will demonstrate how future improvements will be funded and implemented. Decisions by the University with respect to supporting these needs must be in place before the AACSB visit in November if we are to avoid jeopardizing accreditation. 	<p>Since the 2014/15 academic year, we have hired 13 new faculty members and 12 faculty members have retired or left for other business schools resulting in a net increase of 1.</p> <p>We are in the process of hiring another 8 faculty members this year (2017/18).</p> <p>Our goal by 2022/23 is to reach 3,700 FTE degree students and 110 core faculty (student/faculty ratio of about 33).</p>
<ul style="list-style-type: none"> We have been working on the TRACS application to support accreditation for the past 3 years. It will be completed in the next review period. 	<p>The work on accreditation with TRACS is completed.</p>
<ul style="list-style-type: none"> All of the Faculty CV information and teaching information will be collected in TRACS and reports will be generated to support the AACSB visit in the Fall of 2015. 	<p>This has been achieved.</p>
<p>6. Faculty Renewal</p>	
<ul style="list-style-type: none"> As a short-term response, undergraduate student enrolment has been capped and no new graduate programs will be introduced in the near future. 	<p>The BBA program has been capped and remains at about 680 in-take (3,700 head counts or about 3,200 FTE). We have had growth in enrollments of existing graduate programs, and as noted above have not launched any new MBA or MSc programs, though a certificate and NW cohort of our EMBA were developed. In order to initiate new strategic graduate programs, we will need different financial arrangements and adequate resources and space/technology.</p>
<ul style="list-style-type: none"> A plan is in place to ensure the 2015 Accreditation team sees that the Beedie School is working to address the shortfall. 	<p>We are actively recruiting to address the strains that exist on the Faculty's teaching resources. In the 2016/17 academic year we hired 3 new faculty members (an Assistant Professor in Marketing, Lecturer in TOM, and the Ryan Beedie Chair in Finance).</p>

	<p>This year (2017/18) we are recruiting for an additional 8 positions. 5 of the 8 new positions are supported by 5-year bridge funding from the VPAs office.</p>
<ul style="list-style-type: none"> • We do not plan to immediately reduce the number of courses/sections for 3 main reasons: <ul style="list-style-type: none"> a. SFU is a public, comprehensive University, not a private institution and should be accessible to our local communities. Beedie is already under-responding to the needs of local students. Approximately 20% of undergraduate applications to SFU request Business as their first choice major; yet SFU provides only 6.2% of all new student intake spaces to the Beedie School. Reducing the overall size of our student body, in the face of consistent high demand for Business programs, would further erode our ability to serve the demands and needs of our domestic students. b. SFU relies on international students for diversity and also for revenue. Beedie has been asked to take a large share of international students and is working to enable these students to succeed. Lowering the numbers of international students would reduce revenue and reduce Beedie's ability to pay for support services for all students. c. Shrinking the student numbers would result in lower revenue to the Faculty and therefore to faculty or staff being laid off, since 92% of revenue is used for staff and faculty salaries and benefits. The remainder of the budget is almost entirely used to provide premium services to students and support services to international students. 	<ul style="list-style-type: none"> • We are keeping the BBA program's numbers constant—no growth (with the same ratio of international to domestic students—28%) • We are increasing the existing graduate program numbers to the maximum that the classrooms in Segal and Surrey would accommodate (and the resources we have can support them for GDBA) • Any new graduate programming requires new financial arrangements to enable us to support the programs fully. • Space is a crisis issue for Beedie • We plan to develop and expand our non-credit revenue generating Executive Programs in 2018.
<ul style="list-style-type: none"> • The Faculty has requested an increased share of tuition fees for both premium fees (undergrad and grad) and international tuition fees. The principle being used for this argument are: 	<p>We are in discussion with the VPA office in relation to funding issues, as well as special treatment of special programs.</p>

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| <ul style="list-style-type: none">○ Students who pay premium fees are paying more for general university services than regular students.○ Premium services are entirely provided by the Faculty, therefore, all of the premium tuition should flow to the Faculty. | |
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VPA External Review Mid-Cycle Report

Educational Goals Assessment Update

November 30, 2017

Introduction

In accordance with the School's accreditations (AACSB and EQUIS), and the University's accreditation (NWCCU), the Beedie School has worked to establish and assess education goals in each degree program since 2010. The School has two Assurance of Learning Committees (undergraduate and graduate) to provide oversight, facilitate process, and make recommendations to program and curriculum committees where needed as part of the measurement and observation of student performance on specific educational goals.

Assessment Process

The School uses direct embedded measures to collect formative and summative assessments on degree program educational goals using assignments that are 10% or more of an overall course grade. Educational goals and objectives have been mapped to specific courses within a program and rubrics have been developed for all assessments taken. The assessment process and cycle depends on the academic career and curriculum mapping. The School uses a four-point scale (Exceeds Expectations, Meets Expectations, Approaches Expectations, Fails Expectations) for all assessments. Starting with the Fall 2015 semester, the benchmark for students meeting and exceeding expectations was raised to 75% from the 65% which had been implemented at the beginning of the assessment practice at the School. The 75% benchmark more accurately reflects the expected student performance on educational goals.

Undergraduate Program

Educational goals have been developed at both the program level (BBA) and for each of the eight disciplinary concentrations available to students (Accounting, Entrepreneurship and Innovation, Finance, Human Resource Management, International Business, Management Information Systems, Marketing, Operations Management). The undergraduate program offers multiple course sections in each term of an academic year and takes formative and/or summative measures each semester based on curriculum mapping.

Graduate Programs

Educational goals at the graduate program level have been established for each degree (Full-time MBA, Part-time MBA, Management of Technology MBA, Executive MBA, Master of Science in Finance, and PhD in Business Administration) and goals for the newest program (Executive MBA in Aboriginal Business and Leadership) has been developed over a series of iterations with

curriculum mapping in process and under consideration. Graduate program assessment is either formative or summative depending on program specific curriculum mapping.

Educational Goal Updates: 2015 forward

Based on the Educational Goals Assessment Plan submitted September 1, 2015, three future assessment plans were identified at that time.

Monitoring the effects of the 75% benchmark on assessment

The move to raise the benchmark for student learning has become the accepted standard. The 75% more accurately reflects the expectations of student learning than the preliminary mark of 65%. There is no intention to move the benchmark any further at this time.

Periodic review of existing educational goals

The last changes made to the BBA educational goals were in Spring 2013. Concentration educational goals that have been updated more recently (2015 or later) include: Accounting, Entrepreneurship and Innovation, Human Resource Management, and Operations Management. At the graduate level, educational goals updated include: Executive MBA, Management of Technology MBA, the Master of Science in Finance, and the PhD in Business Administration.

Finalization of EMBA in Aboriginal Leadership and Business educational goals

The last draft of the Executive MBA in Aboriginal Leadership and Business educational goals were completed in late 2015 with preliminary curriculum mapping under consideration. Rubrics for assessment are currently pending development.

Assessment Findings and Actions Taken

Based on the assessment results from each academic year, programs and areas are able to review findings and make changes when needed to address rubric clarity, course mapping, and educational goal changes and refinements. We continue to monitor submitted data for consistency of measures and trends in student performance to close the loop in an on-going cycle of continuous improvement.

Undergraduate Program

BBA program educational goals where continued monitoring is needed are related to goals of Critical Thinking (BUS 478), Communication Skills (BUS 360W), and Legal Knowledge (BUS 393) where measurements were at, or slightly below, the 75% benchmark. The rubric for critical thinking was last reviewed in 2011 and the legal knowledge rubric was refined in 2013. The written communication skills rubric was revisited in 2016. The School is actively working on addressing the measurement of Oral Communication Skills, which has not been assessed yet.



Accounting

The Accounting Area reviewed its goals to ensure better correspondence between objectives and rubric traits. This resulted in changes to the rubrics of Advanced Financial Accounting (BUS 420), Advanced Management Accounting (BUS 424) and Auditing (BUS 426). Due to changes in accounting disciplinary knowledge, the Accounting Area reconsidered what knowledge a graduating concentrator should have which led to the rewriting, clarification, deletion and replacement of objectives and rubric traits.

Finance

The Finance Area examined assessment results in Spring 2017 and while students struggled with some educational goals (bond and stock investing; derivative securities), the Area says this is normal and will continue to monitor their student learning. The rubric for one course (BUS 413) was revised for consistency and clarity in 2013/2014 and since then it has been deemed stable and functioning to better assess student learning.

Entrepreneurship and Innovation

The goals and objectives were reviewed and revisited in Spring 2015 which led to the revision of the BUS 477 rubric. The 2015/2016 assessment results indicated that students met the benchmark for all of the traits. Student learning will continue to be monitored and the measurement of the remaining educational goal is in the process of development.

Human Resource Management

In Summer 2014, an instructor submitted suggested refinement to a rubric for BUS 374 which was submitted to the Area Coordinator for review. The proposed HR Management concentration rubric change necessitated changes to concentration goals 2 and 3 in Spring 2015 to improve alignment. The revised rubric was piloted in Summer 2015 and the 2015/2016 results were reviewed by the Area. Student learning met or exceeded benchmark for all (old and new) traits. The goals, objectives and rubric traits appear to be better aligned with the course content and the Area will continue monitoring student learning.

International Business

Overall, the IB Area goals, objectives and rubrics were deemed to be stable and well related to the discipline specific knowledge graduating concentrators should possess. The one exception was a trait meant to capture students' ability to participate in case discussions. The appropriate case material was not always conducive for assessment. This trait was dropped by the IB Area following Summer 2014. Students had difficulty meeting some traits measured in 2015/2016, which the Area will review and provide feedback on possible issues.

Management Information Systems

While the Area did not change its goals, objectives or course rubrics after Spring 2014, the 2015/2016 results (reviewed in early 2017) identified three problem areas. In BUS 362, when students' learning improves on one trait, another trait suffers. The instructor has committed to bringing more balance in the coverage to ensure better student learning on all traits. In BUS 468, the instructors have committed to introduce/review concepts from the core strategy course (BUS 478) to help students who have not yet taken the Strategy capstone. Instructor assessors are also working on ensuring consistency in assessment across course sections.

Marketing

Assessments over the past two years show students are above benchmark with the exception of a concentration goal on target market analysis and selection. The goals and rubrics used in Marketing have been in place without changes since Fall 2013. The Area appointed course coordinators in 2012/13 to coordinate instructors for multiple course sections to ensure coherence and consistency of content.

Operations Management

The OM Area included a new educational goal (sustainable operations) in Spring 2014 which was to be mapped to BUS 475 and assessed in 2016. The course was not offered in 2016 due to reassignment of the faculty member originally slated to teach this course. However, a draft rubric was developed and preliminary measures were taken in Spring 2017. The BUS 473 course rubric was revised in Spring 2014. This change included dropping the assessment of particular quantitative knowledge that was already assessed in a core OM course. The 2015/2016 results reviewed in early 2017 by the Area indicated students are still struggling with specific quantitative knowledge required for this course.

Graduate Programs

Graduate programs all vary in length and approach to assessment. Each program has an independent set of educational goals defined and mapped to the program curriculum to identify places where assessment may be taken. Several programs had changes in Academic Director roles (FT MBA, MOT-MBA, EMBA, MScF) which in turn updated educational goals in concert or following curricular changes.

Full-time MBA

The Full-time MBA educational goals are measured in the capstone course between a written assignment and a simulation. The Full-time MBA program made the transition from student final project to the Comp-XM simulation exam from CAPSIM in 2011. CAPSIM introduced educational goals to the Comp-XM simulation in Fall 2013. Students passed benchmark on educational goals measured outside of the Comp-XM simulation. The CAPSIM Comp-XM simulation results indicated some issues with the deployment of the tool itself from 2012-2014. In cases where

students completed all five rounds of the simulation, areas for improvement appeared to occur in HR and Finance. The program will be reviewing options for other simulation tools for comparison with past findings.

Part-time MBA

The Part-time MBA, when launched in Spring 2014, initially adopted the same program educational goals as the Full-time MBA. However, student demographics proved quite separate from the Full-time MBA. Discussions have been underway about the establishment of Part-time MBA specific educational goals that are more suited to the program particulars.

Executive MBA

The Executive MBA curriculum underwent changes under the new Academic Director and the existing educational goals were revised and re-mapped to curriculum. The previous educational goals were all assessed in the final capstone project which was problematic due to the broad range covered by the past educational goals and the actual scope of each project. Rubrics were also revised and the total number of measured traits were reduced from 22 to 10. This change also moved discrete elements from a single assignment to assignments in specific topic courses.

Executive MBA in Aboriginal Business and Leadership

The EMBA in Aboriginal Business and Leadership (EMBA-ABL) is a 33-month program that was launched in Fall 2012. The initial drafts of educational goals for the program have been revisited and revised as each cohort has progressed through the program with the last iteration of the educational goals completed in 2015. Of particular note with regard to measurement of learning is the revision of the way students will complete the program. The first cohort completed the program with an applied project, often the development of a business plan for an existing or proposed business. However, the variance between them and the relatively small number of students (17) made it difficult to use the projects as an effective measure of learning objectives. The second cohort completed the program through a structured capstone course, the central assignment being an analysis of a business opportunity or problem framed as responses to a series of questions. The questions will reflect the October 2015 educational goals for the program and will be reviewed for fit prior to development of a rubric for piloting assessment.

Management of Technology MBA

With a new Academic Director in place, the program reviewed the existing educational goals and made revisions in 2016. Assessments made prior to the changes indicated no issues with students passing the 75% benchmark on educational goals. The program measures student learning using the final project in the capstone course and intends to continue the same process of assessment with the new educational goals in place.

Master of Science in Finance

The new Academic Director reviewed the educational goals in Spring 2015 and reduced the number of goals from seven to four. These goals were also re-mapped to reflect assessment of the core courses MScF students would take and the two elective streams students would pursue – Investment Management and Risk Management. Curriculum mapping and rubrics were developed and assessment is distributed across courses instead of concentrated in capstone courses and final projects. Updated rubrics were completed in Fall 2015 and preliminary measures using each rubric occur at the next course offering.

PhD in Business Administration

The Academic Director for the program reviewed the educational goals for the PhD program in 2014/15 and made revisions. The teaching educational goal was removed as it contained unobservable objectives and the program does not have a required teaching course that students take. The existing educational goals were refined and the rubrics updated to reflect those revisions. Updated rubrics were completed in Fall 2015. The two places for measurement chosen are the comprehensive exam (BUS 991) and the thesis defense (BUS 992).

Educational Goal: Next Steps – 2017 forward

In 2015, the Beedie School completed a Continuous Improvement Review (CIR) as part of maintaining its AACSB Business accreditation. The Peer Review Team (PRT) made recommendations with regard to the School's approach to assessment and Assurance of Learning (AOL) practice, which the School is in the process of examining and preparing for implementation prior to the next CIR and PRT visit. These recommendations included the "refinement and clarification of the school's strategy and a focusing of the AOL efforts" and "AOL focus".

While the school has done a commendable job of responding to the previous CIR by creating a comprehensive AOL review system and database, it was felt by the PRT that the focus of the AOL was in need of sharpening (e.g., deciding upon 2-3 key features of learning outcomes related to the school's strategic objectives rather than having 5-7 features that are only loosely coupled). The AOL outcomes should be adapted to the strategic objectives of experiential learning outside of the traditional classroom as well to help reinforce the school's achievement of general strategy.

In response to recommendations from the AACSB PRT in 2015 and the more recent revision of the Beedie School mission and calling, the School is in the process of reviewing all program level educational goals for alignment with the School's new mission/calling that was developed. The Beedie 2022 vision for the Beedie School of Business includes a revised calling:

We develop innovative and socially responsible business leaders with a global perspective through education, inspired by research and grounded in practice.

Aligning educational goals with our Calling

The three themes of innovation, social responsibility and global perspective will guide the educational goal review process. Over the course of the 2017/18 academic year, educational goals at the undergraduate and graduate program levels will be revisited and revised to reflect these themes. Once complete, the process of reviewing the curriculum mapping of the new sets of educational goals will begin in the 2018/19 academic year. Current goals, at the program and concentration level, will remain in place until revisions are complete.

Continuing assessment practices

The School expects to maintain the 75% benchmark, the four-point scale for assessment, and the use of direct embedded measurements to reflect current student abilities and discover where learning improvements can be made through curricular/program improvements and student learning support. To address the lack of oral communication goal measures, business communication instructors have developed an oral communication rubric and will begin pilot testing it in the Fall 2017 semester in BUS 360W.



MEMORANDUM

ATTENTION: Ali Dastmalchian, Dean, Beedie School of Business	TEL
FROM: Glynn Nicholls, Director, Academic Planning and Quality Assurance	
RE: External Review Mid-Cycle Report for the Beedie School of Business	
DATE: June 12, 2017	TIME

As per Senate guidelines, the Beedie School of Business is to report on progress being made in the implementation of the Action Plan that resulted from its external review in June 2014. This report will be presented to SCUP and Senate for information. The Dean will be asked to attend the SCUP meeting to provide comment and answer any questions about the update on the Action Plan.

In addition, as per the agreement with Senate, mid-cycle reports in 2017, following the requirement to develop Educational Goals for programs in the Beedie School of Business, are expected to have conducted an assessment of those goals/outcomes. Please include as part of this mid-cycle report submission a 2- to 4-page narrative description articulating the assessment process undertaken by the academic unit, and any changes or adjustments to the established educational goals, the assessment process, and/or the program curriculum that may have arisen as a result of the findings of the assessment. Should you require any assistance in preparing this part of your report, please contact your Educational Consultant from TLC.

Please submit your progress report, using the attached template, by Thursday, November 30, 2017 to Bal Basi at bbasi@sfu.ca. Also attached, for ease of reference, is the Action Plan that was approved by Senate on October 5, 2015.

Please contact me at 2-6702, glynn_nicholls@sfu.ca, or Bal Basi at 2-7676, bbasi@sfu.ca, if you have any questions or concerns regarding the external review update process.

Thank you.

Attach.

cc: P. Keller, Vice President, Academic and Provost

NON-DEPARTMENTAL FACULTY EXTERNAL REVIEW – ACTION PLAN

Section 1 – To be completed by the Dean

Faculty Under Review Beedie School of Business	Date of Review Site Visit June 2014	Faculty Dean Dr. Blaize Horner Reich
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I begin by thanking the Review Committee for a thoughtful report, which outlines the significant strengths of the Beedie School of Business as well as the challenges it faces. This document will focus the Beedie School’s response to the major issue identified by the Reviewers, namely the lack of resources and its impact on the faculty complement. This issue is highlighted in the quote from the External Review Report:

“Resources truly are an issue. The faculty complement is insufficient for the numbers of students. There is little investment in dedicated resources (e.g., for international students, in IT, etc.) compared to what would be usual for business schools of this size.... This is a serious issue, possibly the most serious one facing Beedie and SFU. In short, if Beedie is to retain its position as one of Canada’s very good business schools it simply cannot cope with an ever increasing student population and an overstretched faculty... Additional financial resources will be needed to allow Beedie to cope with its present student population... The Beedie School is at or below the minimum AACSB standard for “participating” versus “supporting” faculty.”

The resource issue is important not only to the Beedie School but also to SFU as a whole. According to the 2015-16 Faculty Allocation Model (FAM), Beedie activities generate \$37M in tuition revenue representing 18% of the University’s tuition total. Over half of this tuition (\$20M) is distributed to other SFU departments and services. On average, each of the 87 Beedie faculty members generates \$422,000 in tuition each year. This means that 18% of the tuition revenue at SFU is generated from 9% of SFU’s faculty contingent (the Beedie School contingent). In addition, Beedie receives only 8.6% of the provincial grant allocated to faculties though Beedie provides 13% of the overall activities and 18% of total tuition revenue at SFU. No other SFU faculty has similar ratios. While the Business school revenues support all programs at SFU, not just its own, it can only continue to do so if it is healthy.

The external review committee notes that Beedie has excellent programs, but there are obvious signs of pressures creating faculty overstretch. The cycle of these pressures is perhaps best exemplified by the addition of International students in the undergraduate program. For example, over a two-year period (2009-2011), Activity from Full-time Equivalents (AFTE) international students within Beedie increased 70% (from 391 to 670). This activity generated new tuition revenue and both SFU and the VP Academic benefited as they collected 55% of this additional revenue. (~\$6-7M annually). The Beedie School had to accommodate a highly international classroom (61% English as a second language), and responded by implementing new courses, lowering class size, making pedagogical changes, and increasing the overall cost of admission processing and communication skill support. The revenue from international students paid for some of these

necessary additional services within the faculty but not all. However, the revenue wasn't sufficient to hire the additional faculty to staff the courses. More resources are required by the Faculty to support not only these students but to ensure a high quality education for all students taking Business courses.

The lack of resources places programs at risk, particularly Beedie's most recent programs including the Aboriginal EMBA, Surrey Part-time MBA, Undergraduate Certificate in Innovation and Entrepreneurship and Undergraduate Business Minor. These programs have been developed to further engage communities in strategic areas within and beyond SFU. Developing and maintaining strategic programs comes at a cost, particularly when the Business faculty complement remains constant.

At the core of the issue is the fact that faculty costs exceed the amount allocated through the Faculty Allocation Model (FAM). Without significant changes to the FAM, there is no long-term sustainable way that the Beedie School can deliver a high quality educational experience to our students. Reducing student numbers (international or domestic) reduces the Faculty budget, which leads to reductions in faculty and staff and decreases the capacity to serve remaining students. Increases in the number of students adds resources, but not enough to cover the cost of serving additional students. This leads to overstretch in existing capacity, which is the current situation. Neither growth nor reduction in numbers of students leads to a high quality, sustainable program. Therefore, Beedie requests a larger share of the premium and international fees from the University.

We recognize the challenge of significantly altering the FAM. This is particularly true in an era of stagnant budgets and increasing costs. These changes will likely require a close look at central services and their effectiveness in supporting revenue-generating faculty activity. In the end, SFU faces a difficult choice of adequately funding Faculties like Beedie through FAM or prioritizing funding to central services in the hope that these central services will cover the inevitable decline of Faculty-based resources. We believe a close examination would suggest that investments at the Faculty level, where revenues are generated, provide the best opportunity for success. I therefore urge the VP Academic to open the FAM for major reconsideration and to provide a more sustainable level of funding to the Beedie School to address the issue of resourcing noted in the external review.

Business Schools are often considered to be privileged units with strong demand from students, premium tuition fees, and well paid faculty. This perception is to a certain extent true. However, because of the strong demand and premium fees, business schools operate in a very competitive environment. There are many alternatives for the best students and the best faculty members and each expects a high quality environment with excellent research, pedagogy, community engagement and placement activities.

Beedie is a good contributor to the University - bringing premium tuition, high quality students, strong research and deep ties with the local business community. We sincerely hope that SFU recognizes this value and supports our students and programs by reallocating funds so we can continue to contribute to SFU and the wider community.

1. PROGRAMMING

OVERVIEW:

The External review indicated that Beedie's undergraduate and graduate programs are excellent programs with strong students and relevant curricula. In providing recommendations, the External Review separated undergraduate and graduate issues. We therefore respond to the graduate and undergraduate responses separately below.

1.1 RECOMMENDATIONS - UNDERGRADUATE

1. Do not expand student numbers
2. Analyze sufficiency of faculty numbers in undergrad program
3. Consider support for international students
4. Examine opportunities for innovative teaching

UNDERGRADUATE PROGRAM - RESPONSE:

- Beedie has adopted a steady state target of 3600 undergraduate student FTEs. It also has set an upper limit of 30% international students. This number of students has been relatively stable for the past 3 years and this target has been accepted by the University.
- Rather than reviewing the undergraduate program regarding sufficiency of faculty; we have reviewed this issue at the faculty level. Results are reported in the Faculty Renewal section.
- Regarding meeting the needs of international students - the Faculty has requested a change to the faculty allocation model (FAM) that would direct more of the premium fee paid by international students to Beedie, where most of the services are delivered. These services are provided at the Faculty level and include:
 - a. Reducing the size of core courses. E.g. the BUS 360W Communication core course reduced from a max of 60 to max of 48, thus enabling more one-on-one time between the students and the instructors. This has improved the success rate of students with communication issues.
 - b. Adding courses. The Faculty has added a first year Business Foundation Program to address communication skills and to better prepare all students for the curricular and co-curricular opportunities provided by Beedie.
 - c. Adding Services. The Faculty has added many support services for international students including a non-credit, on-line Business Writing Essential course, developed in partnership with CODE, to support writing development; a "Let's Talk Business" speaking workshop developed in conjunction with the Student Learning Commons to support oral communication; a Business Mentors Program to provide senior mentors to first and second year students; a standardized writing assessment for all students (domestic and international) developed in conjunction with the Centre for English Language Learning, Teaching and Research (CELLTR) . We have also invested in a two-day professional development of our advising staff on issues related to international students provided by the Faculty of Education.
- Blended learning models will be explored for future deployment when faculty levels are more appropriate. We will continue to work with SFU IT to improve the communication capability across campuses.

1.2 RECOMMENDATIONS – GRADUATE:

- 1. A “breather” on starting new programs**
- 2. Reduce silos and look for opportunity to consolidate**
- 3. Consider moving the Surrey Part Time MBA to Segal**
- 4. Consider increasing flexibility in the program**
- 5. Participate in Global rankings as EMBA improves**

GRADUATE PROGRAM - RESPONSE:

- Beedie will not add any new graduate programs in the next 2 years unless they come with significant additional resources to help address the current funding deficit.
- The Administrative structure will be rationalized to avoid the situation where research professors are administering individual programs. Lecturers will be used, where possible, to administer a portfolio of programs. A concerted focus on student recruitment in the next 2 years will be followed by a period of reflection and, if underfunding continues, consolidation of programs.
- The Surrey part-time MBA will be monitored with respect to compliance with AACSB requirements and fit within the overall portfolio of graduate programs.
- Flexibility within and rationalization across programs will be pursued.
- The EMBA is not an appropriate program to use to participate in rankings since students are not entering the work force after the program. The MBA program is more appropriate and will be considered.
- In addition to the above – Beedie has requested an increased share of the tuition revenue from the Community and Corporate EMBA programs including the EMBA in Aboriginal Business and Leadership and the EMBA in Northwest BC. The programs incur high costs to design, market and deliver but are strategically important to SFU and their respective communities. Increased revenues would allow Beedie to ensure the sustainability of these programs.

1.3 RESOURCE IMPLICATIONS (IF ANY):

- Additional resources from changes to FAM regarding international and premium fees are required for Beedie to hire more professors and reduce the overstretch situation (see Faculty Renewal section).
- Additional resources from changes to FAM regarding graduate international fees, community and corporate EMBA's will be required to support graduate students and program costs and ensure these programs are successful.

1.4 EXPECTED COMPLETION DATE/S:

- Changes to the Faculty Allocation Model are being considered Summer/Fall 2015 and could be implemented for the 2016/17 budget year.
- Rationalization of the graduate programs may occur after analysis of the recruiting cycle in September/October 2015.
- Should additional resources from reallocation of tuition revenues not be available, alternate strategies will be needed to wind down programs. This will likely result in cancellation of one or more of our local part time graduate programs: the EMBA, the EMBA in Aboriginal Business and Leadership, the MBA in the Management of Technology or the Part-time MBA in Surrey. These changes would need to be managed strategically and would likely take until 2018 to fully enact.

2. RESEARCH

From the external report: "The School has been doing well in research in terms of both quantity and quality. Overall, the Committee is highly positive toward the commendable performance in research and scholarly activities by Beedie's faculty."

2.1 ACTION/S (WHAT IS GOING TO BE DONE):

- The research culture is strong within Beedie. We will continue to support it through our two mentor programs (Write Clubs for those people preparing articles and Brown Bag lunches to share research strategies and innovations) and helping faculty apply for research grants (by having an experienced grant facilitator).
- As tri-council grant funding acceptance rates fall, we will continue to look for alternate sources of research funds.
- From the external review report: "the university research services need to be improved and run more efficiently". This is a particularly important issue for Beedie, since our faculty are exploring non-traditional ways of funding and administering their research programs. We continue to challenge the University to support rather than block these initiatives and look forward to assisting them to put new processes and policies in place.
- The PhD program will stay small, with a senior supervisor for each student being identified at an early stage.

2.2 RESOURCE IMPLICATIONS (IF ANY):

- The PhD program funding will be augmented with funds from the Research Centres.

2.3 EXPECTED COMPLETION DATE/S:

- These activities are already underway and will continue

3. ENGAGEMENT and ADMINISTRATION

3.1 ACTION/S (WHAT IS GOING TO BE DONE):

- The Marketing Department will transition away from print toward the development and deployment of digital assets. A video unit will be developed and used to support recruitment of students and engagement with the community.
- External Relations will refine and ensure that Beedie Community, its software systems to track our external engagement partner, is meeting the school's needs.
- Engagement programs such as Mentors in Business (300 pairs) and Speakers in the Classroom (300 per year) continue to be a keystone of community engagement. We will implement Career Talk, an online matching system for students, alumni, employers and friends of Beedie to connect with each other for informational interviews.
- Both Graduate and Undergraduate Career Management Centres will explore how to automate and streamline basic services such as resume writing and will develop online career educational resources in order for advisors to focus on higher value services and increase capacity.
- Undergraduate Career Management will continue to expand its specialty programs such as Investment Banking Prep, Consulting Prep, Sales and Marketing Programs, etc. in order to enhance career preparation and marketability of students.
- SFU is celebrating its 50th Anniversary starting in September 2015 and we will be hosting a special series of student and alumni events to celebrate and create more engagement.

3.2 RESOURCE IMPLICATIONS(IF ANY):

- The Marketing Budget has been increased with the addition of a 2 person video team. Some resources to fund this have been taken from contracts with agencies and printed media.
- There may be significant up front cost for new software services and video production for CMC services.
- Engagement programs such as Mentors in Business and Speakers in the Classroom require staff and operational expenses and we are fundraising for those programs. Career Talk is a yearly license and can be scaled up without additional cost.
- We have allocated funds from Carry Forward and the Dean's Strategic Priority Fund for 50th Anniversary Activities.

3.3 EXPECTED COMPLETION DATE/S:

- SFU's 50th Anniversary formally starts September 9th 2015 and runs through to the end of June 2016.
- CMC Services aim to have the new software and video implemented by the August 2016.

4. WORKING ENVIRONMENT

4.1 ACTION/S (WHAT IS GOING TO BE DONE):

- We need to collaborate and communicate more across our 3 campuses, and will participate in the university's "virtual campus" initiative.
- We will continue to request support from SFU facilities to improve the technology in our Segal classrooms to bring them up to standards set by comparable Canadian graduate business programs.

4.2 RESOURCE IMPLICATIONS (IF ANY):

- These resources will be outside of our budget. We applied (unsuccessfully) for a UPF grant, and will attempt to find external funding to make these improvements

4.3 EXPECTED COMPLETION DATE/S:

- Completion is entirely dependent on access to funds

5. ACCREDITATION

From the external review report: "While the Beedie School has been able to absorb the growth that has been mandated by the University, the expansion risks jeopardizing maintenance of AACSB accreditation, scheduled for 2015."

OVERVIEW:

The Beedie School of Business is accredited both by American-based AACSB and European-based EQUIS, an accomplishment that only a few business schools in Canada have attained. These accreditations help us to attract International students, both undergraduate and graduate. International students are important both for revenue purposes and also to bring a very important global perspective to the classroom. Accreditation brings with it costs, however. AACSB is particularly focused on the ratio of research-active professors in the classroom. As the external review noted, our faculty overstretch puts this accreditation at risk. Therefore we need to find financial resources to increase our faculty complement.

5.1 ACTION/S:

- A careful monitoring of faculty teaching arrangements for 2014/2015 will result in as many research faculty teaching in the graduate and undergraduate programs as possible. Our statistics for this year are critical for continuing our accreditation.
- We will develop a solid plan for future recruitment of faculty that will demonstrate how future improvements will be funded and implemented. Decisions by the University with respect to supporting these needs must be in place before the AACSB visit in November if we are to avoid jeopardizing accreditation.
- We have been working on the TRACS application to support accreditation for the past 3 years. It will be completed in the next review period.
- All of the Faculty CV information and teaching information will be collected in TRACS and reports will be generated to support the AACSB visit in the Fall of 2015

5.2 RESOURCE IMPLICATIONS (IF ANY):

- \$40,000 will be allocated to preparation of and hosting of the AACSB visit. This is over and above existing costs (part time for 1 faculty member, full time for 1 APSA staff)
- 1 APSA staff and 3 co-op students will be used full time to support the TRACS initiative

5.3 EXPECTED COMPLETION DATE/S:

- November 2015

6. FACULTY RENEWAL

From the External Review Report: *"The growth in student numbers... has stretched the resources of the faculty beyond what would be acceptable in strong business schools....Signs of strain are impossible to ignore: Over-reliance on sessionals, lecturers, and non-full-time faculty; Pressures on full-time faculty to teach extra-to-load; and PhD students teaching courses before passing candidacy exams... The school badly needs to hire quality faculty to fill the void in both teaching and research"*

OVERVIEW:

Current program offerings place considerable strain on the Faculty's teaching resources resulting in the issues mentioned in the external review. To be specific, in 2013/14 the Beedie School offered 508 course sections (390 undergrad and 118 graduate) with 82 faculty members. Of these sections, 54% were covered by continuing faculty (tenure track and lecturers). Accreditation requirements (AACSB) require a sustainable minimum of 60% of course sections to be covered by faculty members. This leaves the Beedie School with three choices – increase the number of faculty, decrease the number of sections, or increase overload teaching. Each option is discussed below.

6.1 ANALYSIS:

- The School would need to add between 8 and 10 additional tenure track positions to cover the 32 sections needed to meet the AACSB benchmark of 60% research-active instructors. The budget required to accomplish this (salary, benefits and research support) would be approximately \$2M on a continuing basis.
- The School would need to eliminate 54 sections (from 508 to 454) if no additional research-active faculty were available. This reduction of 54 sections could be accomplished either through increasing class size or eliminating entire programs.

- **Eliminating Course Sections:** Assuming that 40 of the 54 sections are cut from the undergraduate program with no decrease in the number of registrations, the average class size increase from 54 students to approximately 63 students per course section. These 40 sections represent an 11% decrease in undergraduate program offerings, thereby triggering significant course access issues since many Business courses are fully subscribed at current levels. The larger class sizes will mean lower services to students, particularly international students with needs for English language training. As a long-term strategy this results in lower program quality, increased course access issues, reduction in student services and a perpetuation of the high student/faculty ratio within the Beedie School - for students paying a 33% premium for these courses.
- **Eliminating Programs:** Our initial analysis suggests that by eliminating the Undergraduate Business Minor, Aboriginal EMBA, Part time MBA at Surrey and the Undergraduate Entrepreneurship & Innovation Certificate, the Beedie School would save 42 course sections. Eliminating these programs may bring Beedie closer to meeting accreditation standards but will have a severely negative effect on our ability to support existing SFU students (with the minor and the E&I certificate), and the broader community (EMBA ABL and Part Time MBA at Surrey).
- The Faculty is currently in the situation where overload teaching assignments are common, especially in the graduate programs. This is not a viable arrangement going forward, for the following reasons: 1) faculty burnout, 2) potential weakening of research results, and 3) reluctance by SFU to fund overload teaching at market rates. Some overload teaching will always happen but it should not be a core Beedie strategy.

6.2 ACTIONS:

- As a short term response, undergraduate student enrolment has been capped and no new graduate programs will be introduced in the near future.
- A plan is in place to ensure the 2015 Accreditation team sees that the Beedie School is working to address the shortfall.
- We do not plan to immediately reduce the number of courses/sections for 3 main reasons:
 - a. SFU is a public, comprehensive University, not a private institution and should be accessible to our local communities. Beedie is already under-responding to the needs of local students. Approximately 20% of undergraduate applications to SFU request Business as their first choice major; yet SFU provides only 6.2% of all new student intake spaces to the Beedie School. Reducing the overall size of our student body, in the face of consistent high demand for Business programs, would further erode our ability to serve the demands and needs of our domestic students.
 - b. SFU relies on international students for diversity and also for revenue. Beedie has been asked to take a large share of international students and is working to enable these students to succeed. Lowering the numbers of international students would reduce revenue and reduce Beedie's ability to pay for support services for all students.
 - c. Shrinking the student numbers would result in lower revenue to the Faculty and therefore to faculty or staff being laid off, since 92% of revenue is used for staff and faculty salaries and benefits. The remainder of the budget is almost entirely used to provide premium services to students and support services to international students.
- The Faculty has requested an increased share of tuition fees for both premium fees (undergrad and grad) and international tuition fees. The principle being used for this argument are
 - Students who pay premium fees are paying more for general university services than regular students
 - Premium services are entirely provided by the Faculty, therefore, all of the premium tuition should flow to the Faculty.

6.3 RESOURCE IMPLICATIONS (IF ANY):


- Eliminating strategic programs or increasing class sizes are unpalatable solutions to a faculty shortage problem. They negatively affect the School, our students, and the wider community.
- To maintain AACSB accreditation and lessen the current faculty overstretch situation, Beedie will need to hire between 8 and 12 new professors and lecturers. This will reduce the overload teaching and overuse of sessionals and PhD students that is currently occurring. This hiring is in addition to the need to replace retiring faculty.
- To accomplish this hiring, increased allocation of tuition resources is necessary. The Faculty cannot operate on less than 45% of the tuition revenue when government grants are not increasing.

6.4 EXPECTED COMPLETION DATE/S:

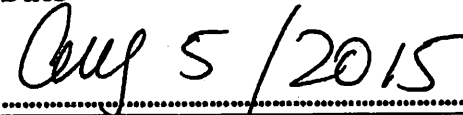
- FAM changes are being discussed in June 2015; these changes are not under the control of the Faculty. If changes to FAM are accepted, the Beedie faculty complement can be increased over the next 3 years.
- If changes to FAM are not accepted, programs will need to be eliminated and services to existing students will need to be decreased accompanied by a decrease in the staff the number of programs and increase in the number of students per section. This strategy will take 2-3 years to implement.

The above action plan has been considered by the Faculty under review and has been discussed and agreed with the Vice-President, Academic.

Dean (signed)



Date



Section 2 - VPA's comments and endorsement of the Faculty Action Plan :

Preface

I agree that the Beedie School of Business needs some assistance in managing its programs and budget. Current data indicate that BSB expenditures per student (weighted or unweighted) are higher than all other Faculties. This suggests that there are some efficiencies to be made, and I am already working with Beedie to suggest some changes. At the same time, I recognize the importance of accreditation to business schools, and I recognize that it is necessary to pay higher salaries to attract good faculty members. I will be providing some bridge funding to bring faculty numbers up to the suggested levels, and to give the Faculty a breathing space to find efficiencies and new sources of revenue. The bridge funding will commence in the 2016/17 fiscal year, and will be spread over a number of years.

I will comment on a number of statements in the action plan that suggest that the Beedie School of Business is somehow competing with other Faculties, the University or the VP Academic for resources. All areas of the university are working to provide students with the best possible education and experience, to support internationally recognized research, and to build relationships with diverse communities. This requires us to work collaboratively and to recognize that no units will receive enough resources to do everything that they would like. All academic units benefit from being part of a larger university, and Beedie both benefits from, and contributes to, this collective effort.

Undergraduate programs

The proposal to stabilize undergraduate enrollments and cap the % of international students is sensible. The changes to the program to better serve EAL students are welcome (it should be noted that this benefits many domestic students as well as international students).

Graduate programs

Discussions are underway about Beedie's share of revenues for these programs. It should be noted that in other Faculties it is normal for research faculty members to manage graduate programs with minimal assistance. The recent implementation of a number of online processes by the Dean of Graduate Studies should result in some efficiencies. Beedie should take a hard look at the administrative costs of their programs.

Research

Although the external review and comparative data from other business schools suggest that Beedie performs well in research, I note that research revenues per full-time research faculty member are lower in Beedie than any other Faculty. This reduces opportunities for students to participate as paid research assistants. Beedie should be taking advantage of a wider variety of funding opportunities and should aim to bring the dollars per faculty member at least to the level of comparable units, such as Education and FASS.

Engagement and Administration

It is appropriate that SFU's business school be at the forefront of community engagement, and Beedie is exemplary in maintaining productive relations with its alumni and in offering current students many networking opportunities outside the university.

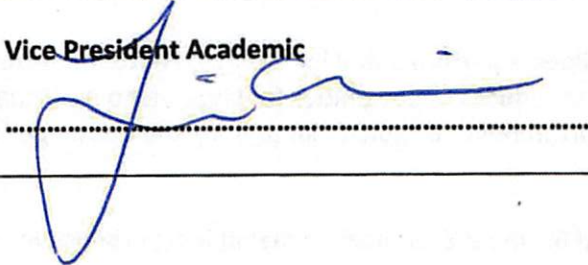
Working environment

I agree that better communication across the three campuses is needed; I believe there is an excellent fundraising opportunity to upgrade equipment in the Segal graduate school.

Accreditation and faculty renewal

I have dealt with some of the resource issues at the start of this document.

Vice President Academic



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Date

12 August 2015

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Beedie School of Business Education Goals Assessment Plan

Submitted By: Dr. Blaize Horner Reich, Dean, Beedie School of Business

Date: September 1, 2015.

History of Assessment

The Beedie School of Business has a well-established assessment process. As a result of our AACSB accreditation, the Beedie School began to formalize its assessment endeavors in 2010 with the development of learning goals, objectives and rubrics. Our assessments are driven by, and congruent with, Beedie's mission statement and core values.

Levels of Assessment

The Beedie School of Business's Education Goals Assessment Plan consists of Education Goals at the following levels:

- Undergraduate Program Level: measured in five core courses that all Bachelor of Business Administration (BBA) students take as part of their degree
- Undergraduate Concentration Level: goals were established for each of the eight concentrations in Business. Measurements are taken from courses specific to that concentration as developed and decided upon by the discipline area.
- Graduate Program Level: goals were established for each program at the Graduate level and measured in specific program courses and projects. For newly launched programs, goals are in draft form.
- PhD Level: goals were established for the PhD program holistically. Measures are taken from exams and proposals.

Measurements were first taken at the beginning of the 2010/2011 academic year. Since this time, changes have been made to both the process and the goals used to guide assessment of students learning. The updated goals and processes are outlined in the following sections.

Education Goals

Educational Goals and Learning Objectives for the Undergraduate program have been mapped to courses that cover the respective goal whereas objectives for graduate programs are mapped to capstone courses for the MBA, MOT-MBA and EMBA. Educational objectives have been mapped to individual courses within the MSc Finance and PhD programs. (The attached learning goals are those being employed for measures as of summer 2015 for the above programs or concentrations).

Goals at each level tend to differ based on the program goals and objectives. However, broad Education Goals, specifically at the BBA program level, can be defined as competencies in:

1. Global Perspectives
2. Ethical Perspectives
3. Critical thinking
4. Communication skills
5. Legal knowledge
6. Core business skills, and
7. Disciplinary knowledge.

Timeline

Based on the frequency of course offerings and program structure, different timelines for the education goal measurement and assessment cycle are taken into account. For example, the undergraduate program is measured at a more frequent rate each semester based on the combined use of formative and summative measurements. Graduate programs are run as cohorts that vary in length from 12 months to 5 years (PhD) and are measured and assessed on a longer cycle with most programs concentrating on summative measurements conducted in capstone courses.

Measurements for all levels are requested following each semester provided the specific measurement area (course, project, or exam) was offered during that time period.

Assessment Design

The Beedie School of Business uses a four-point scale for educational assessment purposes. Instructors complete an evaluation for each student using developed rubrics and course embedded direct measurements. These evaluations are used to indicate whether students are able to demonstrate that they exceed expectations, meet expectations, approach expectations, or fail expectations on a particular rubric trait. In assessing students in this way, the information gathered assists the School in determining where course improvements, topic sequencing, or programmatic changes may be necessary. This is done at formative and /or summative levels depending on the chosen approach for each program.

At the undergraduate and graduate levels, instructors evaluate students based on individually developed course rubrics using existing embedded assignments or exams. Some graduate level educational goals are measured using simulation based exams.

Measurement results and course rubrics are reviewed on an on-going basis. To facilitate the assessment process, Beedie has a formal committee structure used to review assessment results and make recommendations to programs and areas based on learning outcomes. The committees are the Assurance of Learning Undergraduate Committee and the Assurance of Learning Graduate Committee. Feedback from users on rubrics and measurement processes and input from the Assurance of Learning Committees, governing area or academic director on results and trends in student learning are used to

inform needed changes in rubrics, measurement processes, course content, or program support for students.

As of Fall 2015, the benchmark for all Education Goal assessments was raised to 75%. Therefore, results of 'Meets Expectations' or 'Exceeds Expectations' should account for 75% or more of the students measured for an acceptable student performance on defined education goals.

The course embedded assignments used for measurement should bear at least 10% or more weight on a student's overall course grade and the data is collected for all students completing those assignments.

Future Assessment Plans for the Beedie School

As Beedie continues to measure students' learning, we anticipate the following:

1. The 75% benchmark will provide better evidence of areas where students are meeting or exceeding expectations and areas where improvements in process, pedagogy or content are required. Data collection employing the 75% benchmark will continue over the next academic year to determine trends in student performance and will be used to guide and support any decisions taken.
2. The Assurance of Learning Committees will continue to monitor results. At least once in the next five years, all programs and areas of concentration will be asked to assess whether there is new disciplinary knowledge that needs to be included in the goals. If changes are made, then measures will be used to assess our students' learning relative to the new knowledge.
3. Finalization of the EMBA-ABL education goals and objectives that were revised during 2014/2015 will move on to the process of course mapping and rubric development.

Beedie School of Business

Learning Goals - Programs & Areas of Concentration

Undergraduate

BBA Core

BBA Core Education Goals	Measured in
Goal 1: Global Perspective	All objectives measured in BUS 478
Goal 2: Ethical Perspective	All objectives measured in BUS 303
Goal 3: Critical Thinking	BUS 478 (Qualitative), BUS 336 (Quantitative)
Goal 4: Communication Skills	BUS 360 (Written), TBD (Oral)
Goal 5: Core Business Knowledge	All objectives measured in BUS 478
Goal 6: Disciplinary Business Knowledge	*see Learning Goals for each of the eight BBA concentrations
Goal 7: Legal Knowledge	All objectives measured in BUS 393

BBA Accounting

Accounting Concentration Education Goals (2015-06-16)	Measured in
Goal 1: Students will understand that professional accountants need to be ethical and act in socially responsible ways.	All objectives measured in BUS 426
Goal 2: Students will demonstrate problem-solving abilities supported by technical skills and professional judgment.	All objectives measured in BUS 424
Goal 3: Students will have proficiency in written and oral communications to communicate effectively with key stakeholders.	All objectives measured in BUS 421
Goal 4: Students will demonstrate an understanding of the changing nature of the global business environment and be able to recommend reasonable solutions in uncertain situations.	Objective 4.1 and 4.2 measured in BUS 420 Objective 4.3 measured in BUS 426
Goal 5: Students will demonstrate the technical skills to formulate, use, and interpret accounting and auditing-related information.	Objective 5.1 measured in BUS 321 Objective 5.2 measured in BUS 420
Goal 6: Students will demonstrate accounting and auditing-related research skills sufficient to identify professional pronouncements, standards, and thinking regarding current issues in accounting.	All objectives measured in BUS 421

BBA Entrepreneurship & Innovation

Entrepreneurship & Innovation Concentration Education Goals (2015-03-03)	Measured in
Goal 1: Explore opportunities ¹ through identifying and validating customer ² needs.	All objectives measured in BUS 477.
Goal 2: Demonstrate knowledge of the requirements, options and tools available for resourcing an opportunity.	All objectives measured in BUS 314.
Goal 3: Create/Present/Sell a comprehensive model/offering that communicates essential elements of an opportunity to multiple audiences (e.g. client/stakeholder/investor/team members, etc.)	All objectives measured in BUS 477.

BBA Finance

Finance Concentration Education Goals (2014-01-06)	Measured in
Goal 1: Introduce students to bond and stock investing.	All objectives measured in BUS 315.
Goal 2: Introduce students to derivative securities, their role in investments and risk management, and their pricing.	All objectives measured in BUS 316.
Goal 3: Learn the tools of corporate finance.	All objectives measured in BUS 413.

BBA Human Resource Management

Human Resource Management Concentration Education Goals (2015-03-04)	Measured in
Goal 1: HRM graduates will understand the complexities of organizational design.	All objectives measured in BUS 374.
Goal 2: HRM graduates will understand how organizations function, succeed and evolve.	All objectives measured in BUS 374.
Goal 3: HRM graduates will understand how organizations connect to their environment.	All objectives measured in BUS 374.
Goal 4: Graduates will understand how to meet HR requirements.	All objectives measured in BUS 381.
Goal 5: Graduates will understand the changing legal emphasis within HR activities.	All objectives measured in BUS 381.
Goal 6: Graduates will understand employment engagement strategies used by HR.	All objectives measured in BUS 381.

BBA International Business

International Business Concentration Education Goals (2014-02-26)	Measured in
Goal 1: Demonstrate knowledge of the institutional, political and economic environments as they affect the conduct of business across international boundaries.	All objectives measured in BUS 346
Goal 2: Gain knowledge of the influence of cultural and social values and norms on behavior in different national settings, including Canada.	All objectives measured in BUS 346
Goal 3: Demonstrate knowledge of the cross-border activities of firms e.g., intra-firm trade, finance, investment, technology transfers, and offshore services.	All objectives measured in BUS 346
Goal 4: Acquire knowledge on the steps involved in choosing the right entry mode as well as effectively managing these entry modes once the decision has been made.	All objectives measured in BUS 434
Goal 5: Demonstrate knowledge of the strategies and structures that firms adopt to compete effectively in the international context.	All objectives measured in BUS 434
Goal 6: Develop presentation skills that are crucial assets for any student considering a career in international business. This is achieved through case and project presentations.	All objectives measured in BUS 432

BBA Management Information Systems

Management Information Systems Concentration Education Goals (2011-07-15)	Measured in
Goal 1: Students will be able to de-compose a business system into its components.	All objectives measured in BUS 362.
Goal 2: Students will understand how to assess the contribution of information technology to business strategy, and they will know how to analyze the requirements for associated organizational resources.	All objectives measured in BUS 468.
Goal 3: Students will be able to communicate clearly and persuasively with stakeholders.	All objectives measured in BUS 468.

BBA Marketing

Marketing Concentration Education Goals (2013-09-13)	Measured in
Goal 1: Analyze market opportunities through research and quantitative and qualitative analysis.	Objectives 1.1 and 1.4 measured in BUS 447 Objective 1.2 measured in BUS 443 Objective 1.3 measured in BUS 345
Goal 2: Target market analysis and selection based on an understanding of customer behaviour.	Objective 2.1 measured in BUS 347 Objective 2.2 measured in BUS 345
Goal 3: Position products/brands for competitive advantage.	All objectives measured in BUS 446
Goal 4: Develop and use the marketing mix to achieve the selected competitive position.	Objectives 4.1 and 4.5 measured in BUS 446 Objective 4.2 measured in BUS 444 Objective 4.3 measured in BUS 448 Objective 4.4 measured in BUS 443

BBA Operations Management

Operations Management Concentration Education Goals (2014-02-28)	Measured in
Goal 1: Our graduates will understand the strategic role of operations management and its competitive advantage for organizational survival.	Objective 1.1 measured in BUS 474 and 475 Objectives 1.2 and 1.3 measured in BUS 474.
Goal 2: Our graduates will understand the criteria and methods involved in designing, managing, and improving operations.	All objectives measured in BUS 473.

Graduate

FT MBA

MBA Education Goals	Measured in
Goal 1: Communication Skills	BUS 718 Industry analysis paper
Goal 2: Enlightened	BUS 718 industry analysis paper
Goal 3: Integrative Thinking	BUS 718 CAPSIM Comp-XM

PT MBA

MBA Education Goals	Measured in
Goal 1: Communication Skills	BUS 722
Goal 2: Enlightened	BUS 722
Goal 3: Integrative Thinking	BUS 722

EMBA

EMBA Education Goals	Measured in
Goal 1: Critical Thinking and Communication for Leadership	BUS 696 Project, BUS 652 Presentation
Goal 2: Strategic Management	BUS 696 Project
Goal 3: Innovative Strategic Planning	BUS 696 Project
Goal 4: Responsible Management	BUS 652
Goal 5: Global Perspective	BUS 696 Project

EMBA ABL

EMBA ABL Education Goals	Measured in
Goal 1: Develop advanced business knowledge and skills in the context of challenges and opportunities facing Aboriginal Nations, communities and other organizations.	TBD
Goal 2: Understand stages of development of new organizations with multiple goals and people who need to grow into new roles and responsibilities.	TBD
Goal 3: Understand the legal, ethical, economic, governance and strategic dimensions of changing relations between Aboriginal and other organizations.	TBD

MOT-MBA

MOT-MBA Education Goals	Measured in
Goal 1: Think strategically in terms of framing and analyzing business problems and opportunities	BUS 780 Project
Goal 2: Communicate clearly, concisely, and persuasively in written contexts	BUS 780 Project
Goal 3: Choose rationally and transparently between strategic alternatives	BUS 780 Project
Goal 4: Understand business ethics and corporate social responsibility	BUS 780 Project
Goal 5: Identify opportunities and strategies to create and capture value	BUS 780 Project

MScF

MScF Education Goals	Measured in
Goal 1: Learn how to use advanced statistical/financial modeling software	BUS 801
Goal 2: Analyze the statistical properties of financial time series	BUS 803
Goal 3: Evaluate equity investments	BUS 805, BUS 809, BUS 865
Goal 4: Understand valuation models for derivative securities, and related hedging and replication methods	BUS 814, BUS 818
Goal 5: Value fixed income instruments	BUS 810
Goal 6: Understand legal and ethical aspects of investments and risk management	BUS 824, BUS 866
Goal 7: Communicate clearly and professionally	BUS 870

PhD

PhD Education Goals	Measured in
Goal 1: Gain rigorous disciplinary knowledge and ability	BUS 991 Comprehensive Exam
Goal 2: Acquire relevant interdisciplinary knowledge	BUS 991 Comprehensive Exam
Goal 3: Develop fluent, persuasive scholarly writing skills	BUS 992 Written Dissertation Proposal
Goal 4: Possess convincing and engaging presentation skills	BUS 992 Oral Dissertation Proposal