Two-Year Progress Report
Master of Taxation
September 2014

Actions taken as planned in the 2-year plan

Coming out of the 2011 program review, a series of action plans were set out in the final report. All of the plans for the short and medium term have been implemented and are either completed or represent an ongoing initiative.

A. Tax Faculty Advisory Group

2011 Plan: *It is our intention to formalize the current consultative process where input is frequently sought from tax faculty within the School of Accounting and Finance.*

Completed: The consultative process where input is frequently sought from the tax faculty group has been combined with a formalized process. For the first year, separate meetings of the tax faculty group were implemented to seek formalized input through at least two meetings annually. Subsequent to that period, the tax faculty group established formal, regular meetings and the MTax program has been added as a regular item on the group’s agenda. This integration provides the opportunity for regular input and has created the formalized process that we were seeking.

B. Succession Planning

2011 Plan: *While there is no immediate urgency, we agree that a plan to address longer term succession needs will be helpful and we will begin the process of developing a succession plan for full-time faculty who are currently teaching in the MTax program.*

Progress to date: In 2012 the tax advisory group began to consider the issue of succession planning for full-time faculty within the MTax program. There was agreement that there was no imminent concern as the current faculty complement was robust and was doing an excellent job in meeting the academic needs of the program.

The program director works closely with program faculty, school faculty and Tom Scott, the Director of the School of Accounting and Finance, to ensure a smooth transition when changes in faculty complement occur. To address the medium and longer term faculty complement, Professor Ken Klassen, who taught in the program previously, is returning to the program. Professor Klassen is currently working with the program director on a transition plan for his return.
Long term full-time faculty plans and hires are the accountability of Tom Scott who is in regular touch with the tax team to address broad needs on an ongoing basis. The anticipated retirement of one of the current full-time faculty members in 2018 is being addressed through the long term staffing plan and remains an ongoing item.

C. Major Course Changes

2011 Plan:  *Major course changes will continue to work within the pre-defined process.*

**Progress to date:** There is a well-defined process for making significant course changes within the School of Accounting and Finance. This involves preliminary discussion with the tax faculty prior to developing any recommendations. A review of the program courses occurs on a regular basis, and all are current and meeting the program needs. As such, there has been no significant course change over the past two years.

D. Scholarship Review

2011 Plan:  *Review student awards and recognition within the MTax program.*

**Completed:** A review of the program’s award and recognition elements was undertaken in 2012 with input sought from the tax faculty and other stakeholders. The outcome of the review included a redesign of the Entrance Scholarship which was implemented in 2013, along with the formalization of a new mid-program award for two students with a financial need.

E. MTax Learning Model

2011 Plan:  *Ensure that the MTax Learning Model continues to be well integrated into our program philosophy and courses.*

**Progress to date:** During the past two years, input was sought from the faculty and key stakeholders to ensure that the MTax Learning Model continues to be well integrated into our program philosophy and courses. This is an ongoing process where we seek regular and ongoing input through surveys of employers, students and graduates. This allows us to monitor our success in meeting the expected outcomes of the MTax Learning Model and fine-tune activities to reflect changing needs.

F. Tax 638 Course

2011 Plan:  *The advisory group will look at the delivery of this course to ensure the longer term plan continues to meet the needs of our students.*
Completed: Input was sought from the tax faculty on the hiring of an instructor for the Research Paper course as we want to ensure that we address the needs of our students. At the request of students who value the opportunity for greater access to faculty in this hands-on course, two faculty members now share teaching responsibilities. We believe we have achieved the right complement as the size of the class has grown significantly. We will continue to monitor the course and fine-tune as needed.
G.  Tax 625 Course

2011 Plan:  *Review placement of this course in the program stream.*

**Progress to date:** The program review team suggested that the Tax 625 (Tax Policy) course be taught as early as possible in the program. This course was moved from the first term to the second term beginning in the Spring 2012. We are currently completing the second year of this course during the Spring (second) term. With two years now complete, this issue will be a future agenda item.

H.  Monitoring Student Evaluations – “Instructor Availability”

2011 Plan:  *Monitor instructor availability through evaluations.*

**Completed:** As noted in our response to the review team’s report, we believe that the student evaluations indicate a high level of satisfaction for the issue of “Instructor Availability” and that the results are consistent with an on-campus environment. We continue to monitor course evaluations and achieve very positive results.

I.  Learning Model Outcome


**Completed:** As discussed in item (E) above, we have initiated surveys of key stakeholders. The surveys are designed to assess the skills and abilities of the students relative to employer expectations, skills utilized by students during successive work terms, and overall skills and abilities upon the completion of the program.