



# **REVIEW REPORT**

**St Margaret's College**

**10 - 12 August 2009**

Last amended:

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# Executive Summary

## Key Findings

- St Margaret's College is known for its Ethos which emphasises balance allowing residents to develop into good citizens.
- The College's culture encourages academic excellence and its academic programme is strongly supported by tutorials and mentoring.
- The College is well-regarded by the other residential colleges and is recognised for its secure, warm, family atmosphere.
- The Master has now served for more than 20 years and has achieved much to improve the profile and reputation of St Margaret's College.
- The pastoral care offered by the College is exemplary and contributed to by all staff.
- The Residents' Association Executive has a major role in organising and running the College's excellent cultural, social and sporting programme.
- The College's Fellows are important in providing the nucleus of a community of scholars.
- The College's management structure is effective and efficient.
- The appointment of a Deputy Master has enhanced the management's efficiency.
- The Deputy Master has taken over the day-to-day running of the College, performing at a very high level, freeing up the Master to spend time on pastoral care and future planning.
- Communication within the College is very good at all levels.
- The Welfare Staff members are well-trained and function as an efficient and cohesive team.
- The College offers accommodation of a very high standard for its residents.
- The College is an excellent venue for conferences and meetings and the efforts of the Conference Manager are greatly valued.
- The College has initiated a good alumni programme with assistance from the University's Alumni Office.
- The Council has provided wise governance and enhanced the reputation of the College through its strong support and commitment.

# **Commendations and Recommendations**

## **Commendations**

### **Commendation 1.**

St Margaret's College is to be commended for the appropriateness of its Ethos, with its emphasis on the welfare of its residents.

### **Commendation 2.**

The College's Welfare Staff are to be commended for their Study Skills Programme.

### **Commendation 3.**

The College, the Tutorial Manager and the Tutors are to be commended for the excellence of the Tutorial Programme offered by the College.

### **Commendation 4.**

The College and its academic mentors are to be commended for their efforts in running the Academic Mentoring Programme and are encouraged to continue with it.

### **Commendation 5.**

The Master is to be commended for his academic interview process to identify and assist those residents with study problems.

### **Commendation 6.**

The College is to be commended for the provision of Sunday Formal Dinners and Academic and Science/Arts Breakfasts as a means of enhancing useful interaction between its residents and academic and local community leaders.

### **Commendation 7.**

The College is to be commended for its excellent Academic Programme.

### **Commendation 8.**

The College is to be commended for its initiative in appointing College Fellows. Their appointment has contributed significantly to the development of a community of scholars within the College.

### **Commendation 9.**

St Margaret's College is to be commended for its fine Cultural Programme.

**Commendation 10.**

The College is to be commended for its varied Sporting Programme.

**Commendation 11.**

The College is to be commended for its excellent Community Programme.

**Commendation 12.**

The St Margaret's College Residents' Association Executive is to be commended for its major input into the organisation and running of the College's Social, Cultural and Sporting Programmes.

**Commendation 13.**

The College is to be commended for its Social Programme and other events which are effective in delivering "The Otago Experience".

**Commendation 14.**

The Master is to be commended for his vision for St Margaret's College and the success he has had in promoting links with the University of Otago and Dunedin city which have benefitted the College over the past 20 years.

**Commendation 15.**

That the Master is to be commended for successfully delegating some of his responsibilities to the Deputy Master, which has revitalised the College, as well as allowing him to focus on strategic issues.

**Commendation 16.**

The Deputy Master is to be commended for her excellent performance in the management of the College. She has major input into the smooth running of the College and is widely respected.

**Commendation 17.**

The College's Administrator and Conference Manager are to be commended for their efficient running of the office.

**Commendation 18.**

That the Master and Council of St Margaret's College be commended for their plans to establish a scholarship fund to assist needy students to come to the College.

**Commendation 19.**

That the Master is to be commended for his role and reputation within the wider University community, which contribute to the high regard with which the College is held. His active support of colleagues is also to be commended.

**Commendation 20.**

The Property Manager and Maintenance staff are to be commended for their initiative in doing more maintenance work, in-house, around the College.

**Commendation 21.**

The Management of the College is to be commended for its open-door policy and its willingness to be available to other staff.

**Commendation 22.**

The College is to be commended for its efforts in addressing its Treaty of Waitangi obligations.

**Commendation 23.**

The Master is to be commended for his outstanding service in various capacities beyond the College.

**Commendation 24.**

The Master is to be commended on the development and content of "Vision for 2011".

**Commendation 25.**

The College and its staff, of all categories, are to be commended for the high standard of pastoral care they provide for the residents.

**Commendation 26.**

The College is to be commended for its Welfare Staff selection and training processes. Given the additional role of the Senior Welfare Staff, particularly in leading their own groups of Welfare Staff, it is suggested that continuity would be better served if they had a formal job description reflecting their additional responsibilities.

**Commendation 27.**

The College is to be commended for the high quality of the pastoral care it provides for its residents. This care includes assisting residents with a wide range of problems, including physical sickness, emotional and academic issues.

**Commendation 28.**

The College is to be commended for its support of the members of the Welfare Staff and for the systems it has in place to deal with matters they raise from time to time.

**Commendation 29.**

The College is to be commended for its systems for obtaining feedback from its residents.

**Commendation 30.**

The College is to be commended for the good behaviour of its residents and the infrequent need for disciplinary action.

**Commendation 31.**

The College is to be commended for the cultural diversity of its Welfare Staff team.

**Commendation 32.**

The College is to be commended for the quality of its accommodation for residents and the ongoing maintenance programme which ensures that the rooms and facilities are upgraded, as necessary.

**Commendation 33.**

The members of the cleaning staff of the College are to be commended for the high standard of their service.

**Commendation 34.**

The College is to be commended for the high quality of its food service.

**Commendation 35.**

The Head Chef is to be commended for his outstanding contribution to the College's food service.

**Commendation 36.**

The College is to be commended for the high standard of its conference and meeting facilities which are used frequently throughout the year. In particular, the Conference Manager is to be commended for the high regard with which she is held for her efficiency.

**Commendation 37.**

The College is to be commended for the mutually cooperative relationship it has with the University's Summer School, as a provider of accommodation for the School's students.

**Commendation 38.**

The College is to be commended for its strong relationships with key University departments and services.

**Commendation 39.**

The College is to be commended for initiating the development of its alumni programme.

**Commendation 40.**

The College is to be commended for the high quality of its publications and website as sources of information for its residents and conference clients.

**Commendation 41.**

The College and its IT Manager are to be commended for the excellent information technology support which is available to all residents and staff.

**Commendation 42.**

The College is to be commended for its Health and Safety procedures.

**Commendation 43.**

The Council of St Margaret's College is to be commended for its major contribution to all aspects of life within the College, including its strong support of the Master.

**Recommendations****Recommendation 1.**

That consideration should be given to including the Property Manager in the senior staff management meetings.

**Recommendation 2.**

That the College management should be more proactive in ensuring staff participate in appropriate professional development courses.

**Recommendation 3.**

That the Master should consider preparing a specific job description for Senior Welfare Staff reflecting their additional responsibilities as group leaders.

**Recommendation 4.**

That the College should relieve the Residents' Association Executive of any responsibility for imposing fines on its residents.

**Recommendation 5.**

That the College should give consideration to the appointment of a mentor to provide advice, as necessary, to the Residents' Association Executive.

## ***Introduction***

St Margaret's Presbyterian Residential College was established in 1911 to provide residential accommodation for young women attending the University of Otago and the Dunedin Teachers' Training College. The College provided an environment conducive to "the advancement of sound learning and the care and protection of women students". St Margaret's College was the third residential college to be established in Dunedin and was the first dedicated to the care of women students.

In 1981, in response to social changes and declining numbers, St Margaret's College accepted its first male residents. The incumbent Warden (henceforth Master) was appointed in 1989. This was highly significant as it was the first time a man had been appointed to lead St Margaret's College. Over the past two decades, there have been many changes initiated by the Master some of which will be highlighted in the review report.

In 2003, St Margaret's College was the first residential college to be reviewed according to the University's review process for residential colleges. The review report was largely supportive and useful as it provided an external assessment of the College's performance.

The present review was carried out within the College from 10-12 August 2009. A Self-Review document was prepared for the Review Panel which addressed the Terms of Reference for the review. It was supported by the College's Staff Handbook, Welfare Staff Handbook, Members' Handbook and the "Vision for 2011". Eighteen written submissions were received and the College's senior management, the Welfare Staff, and several other staff were interviewed, as well as College Fellows, the present Chairman, and a long-serving former Chairman of the Council. University administrative staff with an interest in the College were interviewed as were several of the Heads of Residential Colleges, both University and affiliated. There were also social opportunities for the Panel to meet other groups, including the College's Residents' Association Executive and the members of the College's Council. The interviews and meetings with the Review Panel were invaluable sources of information. Indeed, all of those interviewed, and the opinions expressed in the submissions, were strongly supportive of the College. In addition, the Panel inspected the College's amenities and the impressions gained from all sources of its deliberations are summarised in this report.

## **1. Ethos**

### **General comments**

There are 14 residential colleges which provide accommodation for students studying at the University of Otago. Nine colleges are owned and operated by the University and five are independent and are affiliated to the University. Each college has developed its own characteristics and traditions over the years and the influence of the head of college is significant in this respect. There is great diversity amongst the residential colleges which is important in contributing to the value of the residential colleges to the University in attracting the large numbers of students from all over New Zealand, as well as international students. The residential colleges have helped enhance the University's reputation for excellence by providing accommodation for their residents of a high standard in a homely environment.

St Margaret's College occupies an impressive site close to the main campus of the University with attractive buildings and a well-established garden which project a homely and warm atmosphere. The College's main objective is to provide for the welfare of its residents.

Following his appointment in 1989, the Master of St Margaret's College pursued a plan to implement his vision for the College. His academic background enabled him to develop a network within the University and his pastoral experience led him to establish links with the wider community of Dunedin. Important as academic achievement may be, however, personal development and consideration for others are crucial elements in becoming a good citizen. The staff, senior residents, the Fellows and the members of the Council of St Margaret's College serve as role models for the residents. The residents feel that they are part of a community and this permeates all of the College's academic, cultural, social and sporting programmes.

#### **1.1 The definition and appropriateness of the College's Ethos**

The College has a high profile and its prevailing ethos is one of care and contribution. Reflecting his strong background as a theologian and Roman Catholic priest, the Master has promoted academic excellence and the provision of high quality pastoral care for the College's residents. A community of scholars has evolved which has been facilitated by the College having a high proportion of academically able returning students and the appointment of College Fellows, the majority of whom are, or have been, members of the University's academic staff. The academic standard of residents entering the College has improved steadily, as has their performance in University examinations. The results for Health Sciences First Year are excellent, and many residents gain entry to the schools of medicine and dentistry in the face of strong competition. In parallel, the College has varied social, cultural and sporting programmes for its residents to participate in during their

leisure time. It is not surprising that St Margaret's College now has a reputation for providing a safe and homely environment for its residents to succeed academically, while acquiring valuable personal and social skills.

#### **Commendation 1.**

St Margaret's College is to be commended for the appropriateness of its Ethos, with its emphasis on the welfare of its residents.

### **1.2 The College's Academic Programme**

#### **1.2.1 Study Skills Programme**

The study skills programme which is presented by the Welfare Staff after the first week of orientation is a light-hearted but useful means of subtly altering the focus of residents towards their academic studies. It also provides an opportunity to discuss learning techniques and to outline study resources available for residents both within the College and the University.

#### **Commendation 2.**

The College's Welfare Staff are to be commended for their Study Skills Programme.

#### **1.2.2 Tutorial Programme**

The Tutorial Programme at St Margaret's College is very carefully planned and managed. The Tutorial Manager has a key role in directing the tutorial programme. The success of the programme is seen from the examination results of papers which have sufficient enrolments to justify tutorials. This is particularly so for the Health Sciences First Year subjects. The selection of tutors is crucial and the College seeks advice from the academic departments before making tutor appointments and the calibre of the College's tutors is high. The College has procedures in place that ensure that the tutors and the tutorials are assessed. To be useful, the tutorials must be interactive and driven to a large extent by the residents providing questions and problems for the tutors to address. Attendance is monitored and feedback is important in gauging the usefulness of the tutorials.

#### **Commendation 3.**

The College, the Tutorial Manager and the Tutors are to be commended for the excellence of the Tutorial Programme offered by the College.

### **1.2.3 Academic Mentoring Programme**

The College's Academic Mentoring Programme, now in its eighth year, is dependent on the voluntary participation of academically able returning residents for its success. Each mentor assists by facilitating group discussion and addressing course-related questions for a small group of first year residents. They do not act as tutors, but provide support and advice. The programme is dependent on the enthusiasm and ability of the mentors and is rated as being moderately successful.

#### **Commendation 4.**

The College and its academic mentors are to be commended for their efforts in running the Academic Mentoring Programme and are encouraged to continue with it.

### **1.2.4 Study Books**

The College produces a useful resource in the form of Study Books. They are used in tutorials, mentoring groups, and for individual and group study. The Study Books also contain a bank of recent examination papers which are helpful in preparation for examinations.

### **1.2.5 Personal Encouragement and Support**

The Master interviews each resident to assess his/her academic ability and needs. This includes exploring the individual's study habits and to ascertain whether or not there is any academic weakness. If the Master has a concern, he will see individual residents with problems in order to help them by working out a study programme suited to their needs.

#### **Commendation 5.**

The Master is to be commended for his academic interview process to identify and assist those residents with study problems.

### **1.2.6 Sunday Formal Dinners and Academic and Science/Arts Breakfasts**

Exposing residents to invited guests to the College's Sunday Formal Dinners from the University's academic staff and local community leaders is seen as valuable and is part of the academic programme. The Science/Arts Breakfasts potentiate the interactions which are useful in allowing residents to learn about activities and other academic matters outside their own areas of study. The guests are usually invited to speak at these functions, as well as the College's Valedictory Dinner (refer to 1.5.3).

#### **Commendation 6.**

The College is to be commended for the provision of Sunday Formal Dinners and Academic and Science/Arts Breakfasts as a means of enhancing useful interaction between its residents and academic and local community leaders.

#### **Commendation 7.**

The College is to be commended for its excellent Academic Programme.

### **1.2.7 Institution of College Fellows**

Some ten years ago, the College initiated the appointment of College Fellows in recognition of their service to the College. It has been a significant move and has allowed the Fellows to retain a tangible and strong link with the College and to provide the nucleus of a community of scholars. The Fellows enjoy their role and there are now more than 40 who are a valuable source of advice and wisdom for the College's residents as well as its staff. Many Fellows come from an academic background, but others are from the local community or from the College's alumni.

#### **Commendation 8.**

The College is to be commended for its initiative in appointing College Fellows. Their appointment has contributed significantly to the development of a community of scholars within the College.

### **1.3 The College's Cultural Programme**

The Cultural Programme is centred on the College's Choir, debating competitions and public speaking contests. Established in 1972, these activities form the basis for the competition for the Iona Trophy which involves Salmond, Studholme and St Margaret's Colleges. The College's Choir also performs at graduation church services as well as competing with other residential colleges.

#### **Commendation 9.**

St Margaret's College is to be commended for its fine Cultural Programme.

### **1.4 The College's Sporting Programme**

Contrary to popular but misinformed belief, St Margaret's College offers a wide range of sporting activities, mainly for friendly competition. The College competes with Salmond and

Studholme Colleges for the Southgate Trophy which has a long history but went into abeyance before being reinstated a few years ago. College residents participate in various social sports in the University, but there are also serious sportsmen and sportswomen who have made their mark at higher levels.

#### **Commendation 10.**

The College is to be commended for its varied Sporting Programme.

### **1.5 The College's Community Programme**

#### **1.5.1 Community Service Projects**

The College's Ethos embraces service to others, including the wider community, by its residents and staff. The College selects a project for each year, in preference to holding initiation ceremonies. These have been admirable projects benefitting the community and have included working on the Orokonui Bird Sanctuary, working with the Dunedin Community Constable to do gardening and window cleaning for pensioners in the Dunedin North area, working with Arai Te Uru Marae, and helping to build an entire house for Habitat for Humanity.

#### **1.5.2 Bringing the Community into the College**

The College's Residents' Association Executive sponsors a child through World Vision and coordinates and encourages the residents to participate in the 40-Hour famine. Other activities are held to promote interaction with the wider community, from time to time.

#### **1.5.3 Community Service Encouragement**

The College recognises the community service of its residents by the award of an array of trophies which are presented at the Valedictory Dinner.

#### **Commendation 11.**

The College is to be commended for its excellent Community Programme.

## **1.6 The College's Social Programme and other events in delivering "The Otago Experience"**

The College's Social, Cultural and Sporting Programmes are largely organised and run by the Residents' Association Executive. The contribution of the Residents' Association Executive is substantial and takes much time and effort by an elected but voluntary group. The large number of events that are offered for the residents is testimony to the work entailed in preparing for and running these events.

### **Commendation 12.**

The St Margaret's College Residents' Association Executive is to be commended for its major input into the organisation and running of the College's Social, Cultural and Sporting Programmes.

### **Commendation 13.**

The College is to be commended for its Social Programme and other events which are effective in delivering "The Otago Experience".

### **Commendation 14.**

The Master is to be commended for his vision for St Margaret's College and the success he has had in promoting links with the University of Otago and Dunedin city which have benefitted the College over the past 20 years.

## **2. Management**

The affiliated colleges are governed by councils and the individual heads of these colleges have a relationship to their councils similar to major businesses in which there is a chief executive and a governing board of directors. This governance model has been in place at St Margaret's College during the tenure of its Master and has been facilitated by his excellent relationship with the Council's Chairmen with whom he has served.

### **2.1 The appropriateness and effectiveness of the College's management structure**

In 2006, a new position of Deputy Warden (now Deputy Master) was created and the incumbent, a former resident who had been at the College for three years, was appointed. Since that time, management responsibilities have been successfully divided and she has been given a clearly defined role. It is clear that the Master and Deputy Master have skills that are complementary and they have agreed on a distribution of responsibilities that is an effective use of their respective strengths. Reporting lines have been established and are understood by staff. The communication between the Master and Deputy Master is open and frequent, so that each understands the issues the other is dealing with, and can give advice when asked. They are working effectively towards achieving the same goals. More importantly, the Deputy is well-equipped to deputise for the Master whenever there is a need.

The Deputy Master has made a major impact on the College's day-to-day operation as she manages the office, kitchen, cleaning and maintenance staff. She performs her role with skill and is highly regarded by the staff.

#### **Commendation 15.**

That the Master is to be commended for successfully delegating some of his responsibilities to the Deputy Master, which has revitalised the College, as well as allowing him to focus on strategic issues.

#### **Commendation 16.**

The Deputy Master is to be commended for her excellent performance in the management of the College. She has major input into the smooth running of the College and is widely respected.

The College's Administrator runs the office and has contact with residents dealing with enquiries, and invoicing fees. She is a "mother figure" and has a good rapport with the residents. She maintains good communications with the Deputy Master. The Conference Manager assists the Administrator when she is free. They have a good working relationship.

### **Commendation 17.**

The College's Administrator and Conference Manager are to be commended for their efficient running of the office.

Over many years, the College has established a niche market with a high proportion of residents enrolling for the Health Sciences First Year papers. As a consequence, there are now many more applicants than available beds. These applicants are attracted by the strongly academic focus of the College, and its promotion as "the quiet College". The Master is aware of this trend and, in recent years, the College has tried to broaden the range of students it attracts by operating a policy of "positive discrimination".

The College is also putting in place a process to provide financial assistance to residents who are disadvantaged by their socio-economic background, and who have difficulty making fee payments. The Master and Council have plans to establish a scholarship fund as a Centennial project.

### **Commendation 18.**

That the Master and Council of St Margaret's College be commended for their plans to establish a scholarship fund to assist needy students to come to the College.

The Welfare Staff are appointed from within the ranks of existing residents, many of whom are second year residents when they become members of the Welfare Staff. For some, the transition to the status of Welfare Staff member is a challenge, made more difficult by their friendship with non-welfare staff residents. The training programme for Welfare Staff is varied and comprehensive, involving a number of outside resource people, and the members of the Welfare Staff value it highly. The structure appears to work well in the College and is important in maintaining its ethos.

## **2.2 The leadership with regard to developing and maintaining the professional standing and reputation of the College**

The Master is highly esteemed within his profession, the University, and the wider community. His personal reputation is inseparable from St Margaret's College. He has an outstanding ability in building strong links with individuals, University academic departments and administrators, community groups and organisations, schools and residential colleges, including some overseas. He is an excellent communicator with a skill in writing, as evidenced by St Margaret's publications, and public speaking. He has cultivated strong linkages which have been of benefit to the College and its residents. Regarded as the "elder statesman" of the group of heads of colleges in Otago, he is very aware of the needs of his colleagues and is very supportive in times of crisis or difficulty, or when new heads are appointed and in need of advice and guidance.

### **Commendation 19.**

That the Master is to be commended for his role and reputation within the wider University community, which contribute to the high regard with which the College is held. His active support of colleagues is also to be commended.

### **2.3 The processes and procedures for consulting and liaising with employed staff, administration at the University, and other interested parties, and incorporating feedback into the College**

Brief weekly meetings are held with senior staff and the Master (management meetings), ensuring that everyone is up-to-date with current issues and forthcoming events, and providing an opportunity for consultation. It was noted that the Property Manager is not part of these meetings.

#### **Recommendation 1.**

That consideration should be given to including the Property Manager in the senior staff management meetings.

Monthly meetings are held with the heads of residential colleges (Residential Colleges' Liaison Advisory Group), providing an opportunity for consulting with colleagues. As well, there is frequent contact with individual colleagues by telephone and email. Additionally, there are regular meetings with the other heads of affiliated colleges in Dunedin and Christchurch.

The Master is well-known to the University administration staff, and does not hesitate to contact appropriate people, from the Vice-Chancellor down, to express his views on an issue. His opinions are frequently sought and are valued. In addition, he has an informal fortnightly meeting with the Director of Accommodation Services.

### **2.4 The processes and procedures for ensuring employee capability, including induction and mentoring of new staff, staff training and development, and staff performance review**

The College is a member of the Otago-Southland Employers' Association which provides assistance with staffing matters (including Employment Agreements and rare industrial disputes). There is an annual performance review process for all employed staff. Whilst all members of staff are aware that professional development is available to them, many do not take advantage of this, and it is clear that the College management could be more proactive in ensuring staff participate in appropriate professional development courses. The

Staff Handbook is comprehensive, though some areas need to be updated and revised, perhaps with the guidance of the Employers' Association.

**Recommendation 2.**

That the College management should be more proactive in ensuring staff participate in appropriate professional development courses.

The use of the Property Manager and his staff to carry out more maintenance work in-house, rather than using outside contractors, is a commendable example of the way in which members of the staff are encouraged to use their initiative and full capabilities, while saving money for the College.

**Commendation 20.**

The Property Manager and the Maintenance staff are to be commended for their initiative in doing more maintenance work, in-house, around the College.

**2.5 The processes for identifying, considering and responding to problems raised by staff**

Regular staff meetings, and an open-door policy practised by both the Master and Deputy Master, ensure that there is ample opportunity for staff to raise any problems they may experience. There are clearly defined lines of responsibility, and open communication is encouraged so all staff are aware of who they can go to with problems, and none expressed a reluctance to do so.

**Commendation 21.**

The Management of the College is to be commended for its open-door policy and its willingness to be available to other staff.

**2.6 Awareness of Treaty of Waitangi obligations**

The College's Treaty obligations arise from its affiliation with the University of Otago. While not bound by the University's legislation, it "tries to walk the same path", and with regard to the Treaty of Waitangi it does well.

In 2009, there are eight Māori students residing in the College which is one or two more than usual. They are made to feel welcome from their arrival, with dual-language signage, and the welcome for new residents and their families being opened in Māori. This year, one of the Senior Welfare Staff is Māori, as is a member of the Residents' Association Executive.

There have been visits to Arai Te Uru Marae, and one year the College's orientation week project provided assistance to the Marae. There are good relations with Te Tumu, where two senior members of staff (one former, one current) are Fellows of the College, people who show interest and support for Māori residents. The Māori Centre now provides the scholarship information and support that St Margaret's College formerly provided for its Māori residents. The quality of the University's tutorial system was reviewed in 2008 and the recommendations of the University's Tutorial Review Committee are soon to be implemented. This should improve the overall standard of the University's tutorials, although it is unlikely to have an impact on the College whose in-house tutorials are of a very high standard.

**Commendation 22.**

The College is to be commended for its efforts in addressing its Treaty of Waitangi obligations.

**2.7 Staff participation in and contribution to the community and to the University**

The Master's participation in activities outside the College has been significant. He has been President of the Graduates' Association and Chair of the Court of Convocation for some years, and he has chaired the Residential Colleges' Advisory Group since its inception. His personal networking within the University, and beyond, provides jointly beneficial information exchanges that have continued over many years (refer to Commendations 14 and 19).

Colleague Heads of other Otago residential colleges noted the Master's great collegiality over the years. Many have received "welcome" letters on appointment, and a friendly offer of help. The Deputy Master, who has two small children, has also developed a unique outreach to staff families who meet once a week at a very suitable venue for youngsters within the College. The Master retains his links with the Catholic Church through the Holy Cross Centre in Mosgiel and the Holy Name parish in Dunedin North. He has links with many other religious leaders throughout the country and the links between the Roman Catholic and Anglican denominations are particularly strong.

**Commendation 23.**

The Master is to be commended for his outstanding service in various capacities beyond the College.

## **2.8 The effectiveness of the College's financial management and links to planning**

Although the Panel did not examine the College's financial systems, it is evident that they are sound and work well.

- The IT Manager maintains, and the Administrator uses, a resident database for resident invoicing.
- A professional chartered accountant prepares monthly reports against budget, and the annual accounts.
- Deloitte audits the annual accounts.
- A subcommittee of Council, including the Chairman, the Deputy Chairman, the Master and the Accountant, reviews progress and plan developments.
- The Council receives reports, approves budgets and the annual accounts.

The links to planning are clear, with a number of recent building developments and valuable positions added to the College's staff in the last few years. On-going upgrading of accommodation is evident throughout the College. The "Vision for 2011" document outlines medium and long-term developments planned for the future. The first of these will be the extension to the dining room that has just been approved by the Council.

## **2.9 The processes for developing a vision and making plans for the future**

The document, "Vision for 2011", is remarkable and unique among the Otago residential colleges. It is successful in setting the ethos of the College within the western university system, the University of Otago, and its own background as a Presbyterian foundation. It is wide-ranging in its understanding of, and the provision for, the needs of young students embarking on their academic, and adult, lives. The document is specific about plans for the future, from the immediate, such as the addition of a conservatory to the dining room, to substantial new accommodation and resource rooms.

"Vision for 2011" was developed in consultation with the College Council, staff, including the Welfare Staff, and some alumni and College Fellows. The document is now available to share the vision for St Margaret's College with all of these groups, as well as other interested parties, and as a touchstone for future planning.

### **Commendation 24.**

The Master is to be commended on the development and content of "Vision for 2011".

## **2.10 The processes and procedures for implementing plans**

The processes and procedures for the implementation of plans involve the Council, Master, senior staff, IT and financial systems, and their excellent communications and management systems. The first Review of the College brought about a number of developments, the most important of which were the addition of a Deputy Master and the consequent ability of the Master to take a substantial sabbatical and professional development.

The addition of the floor to the Clyde Wing, the changes to Thorpe House with the addition of the Fellows' Room, the well-organised programme of ongoing refurbishment, and now the plans for the dining room extension, all point to successful implementation of plans.

The College will hold its Centennial celebrations in 2011 and the University's Alumni Office is able to assist with database development, brochure production and mailing. The vision for the celebrations, the writing of invitations and brochures, and the direction of the marketing, the planning for the events, and the administration, will be directed by the Master and the College's Council. The Centennial will provide an excellent opportunity for a long and productive relationship with the alumni.

### **3. Resident Welfare**

#### **3.1 General**

The residents of St Margaret's College are very well-supported in their personal, academic and social development. The gracious nature of the institution, the excellent and homely quality of the buildings, the thorough pastoral care and the high level of support for personal academic success all form a package which is exemplary in the provision of quality resident welfare. Through his professional concern for the College's residents, the Master has introduced appropriate systems and selected staff well-suited to provide high quality pastoral care.

The management, welfare staff, ancillary, catering and domestic staff are dedicated to fully supporting the residents during their time at St Margaret's College. They all contribute to pastoral care and this was evident to the Panel during the Review.

#### **Commendation 25.**

The College and its staff, of all categories, are to be commended for the high standard of pastoral care they provide for the residents.

#### **3.2 Welfare Staff selection, training, mentoring and performance review**

Welfare Staff are carefully selected from within the ranks of the College. The Master and the current Welfare Staff have a major role in the selection process. The College makes extensive use of second year residents as Welfare Staff. Although this is not common practice at other residential colleges, it seems to work well at St Margaret's largely due to the ethos of the College and the calibre of the young people available for selection.

Occasionally, these young staff struggle with supporting residents of their own age, but this is normal in any situation where some are elevated to a status of supervision over their peers. Staff training is diverse and extensive starting in early February and concentrating on team building processes and pastoral care and support. The Master utilises a wide array of specialists and outside personnel to carry out Welfare Staff training.

The team is cohesive and supportive of each other and the ear of the Master is never far away for support and guidance. It is obvious that the Welfare Staff enjoy the mutual company of the team. Although the Master does not carry out a formal review of each Welfare Staff member, the opportunity for mid-year appraisal is available. With the closely knit nature of the team and its relationship with the Master, the informal review process seems to work well.

### **Commendation 26.**

The College is to be commended for its Welfare Staff selection and training processes. Given the additional role of the Senior Welfare Staff, particularly in leading their own groups of Welfare Staff, it is suggested that continuity would be better served if they had a formal job description reflecting their additional responsibilities.

### **Recommendation 3.**

That the Master should consider preparing a specific job description for Senior Welfare Staff reflecting their additional responsibilities as group leaders.

### **3.3 The adequacy of pastoral care provided to residents**

Residents, staff and outsiders have all spoken to the Review Panel with a united voice concerning the very high quality of pastoral care received by the residents of the College. Residents with emotional cares, physical sickness or other distress, such as transient reactive depression, are all well-supported by the staff. The Master takes great care to get to know the College residents and meet with them on a regular basis throughout the year. These meetings are both formal and informal. The Master and other staff have major input into the ongoing support of residents who may be struggling with academic matters. This support is evident through regular meetings and academic mentoring.

### **Commendation 27.**

The College is to be commended for the high quality of the pastoral care it provides for its residents. This care includes assisting residents with a wide range of problems, including physical sickness, emotional and academic issues.

### **3.4 The processes for identifying, considering and responding to problems raised by Welfare Staff**

The members of the Welfare Staff have a regular meeting each week with the Master at which concerns and questions can be raised. The atmosphere is open with staff sharing their concerns freely with each other to gain mutual support. The Welfare Staff members are welcome to visit the Master to discuss particular situations with him. Each junior member of the Welfare Staff has a defined Senior Welfare Staff member to act as a liaison and support person if they require extra guidance and assistance.

### **Commendation 28.**

The College is to be commended for its support of the members of the Welfare Staff and for the systems it has in place to deal with matters they raise from time to time.

### **3.5 Consultation and liaison with residents and incorporating feedback into the College**

Residents may express their concerns to Welfare Staff, employed staff, the Residents' Association Executive or the Master. In general, it appears that concerns about life at the College are few and far between. Concerns and suggestions related to the Food Service are raised through the 6-weekly food meetings. There is no resident voice on the College Council, which is out of step with most other areas of the University. However, the Council varies from the University residential colleges' Advisory Councils which have no governance role. The Panel understands that the College Council seeks the opinion of residents, when appropriate.

### **Commendation 29.**

The College is to be commended for its systems for obtaining feedback from its residents.

### **3.6 Provision of care for residents with special needs**

The College acknowledges that residents with certain special needs would be challenged in trying to deal with the geography of the College set, as it is, on a steep section. Wheelchair access is very limited. When needed, Welfare Staff are assigned to residents with special needs and liaison occurs with various University service departments for further assistance, as appropriate.

### **3.7 Resident discipline**

The opinion formed throughout the Review by the Panel is that resident discipline is not a major concern at St Margaret's College. Incidents of vandalism, inebriation and anti-social behaviour are rare. The physical state of the College's facilities and the courteous manner of its residents and staff indicate that the standard of behaviour is exemplary. The Master sets a positive tone for behaviour and expects the residents to follow his example. When required, a system of fines is used for minor misdemeanours, such as noise violations. The fines are small in magnitude and appear to be imposed infrequently. The College has a policy of dealing with minor problems on an informal basis before a fine is instituted. In any situation involving resident discipline, there is a risk of inconsistency in its application. Certain members of the Welfare Staff may be more vigilant about disciplinary enforcement

than others which may occasionally cause grumbling amongst some residents. However, this seems to be a rare occurrence.

**Commendation 30.**

The College is to be commended for the good behaviour of its residents and the infrequent need for disciplinary action.

**3.8 The provision of adequate care to residents from different cultures**

The College's residents come from a wide variety of cultural backgrounds. The composition of the Welfare Staff team reflects the diverse cultural background with European, New Zealand European, Māori and Asian members.

**Commendation 31.**

The College is to be commended for the cultural diversity of its Welfare Staff team.

## **4. Core Services and Activities**

### **4.1 The range and scope of the College's services and activities i.e., accommodation, food service and conferences**

#### **4.1.1 Accommodation**

The College provides accommodation for 224 residents and has an additional two guest rooms. The accommodation provided is of a high standard in a number of old and new buildings which are in excellent condition. There is limited access for physically disabled residents, and the College shows common sense in dealing with this issue. There is an ongoing maintenance programme that ensures rooms and facilities are upgraded as required. In addition, the grounds and gardens are superb. The College benefits greatly from the work that is done by its maintenance staff. They show initiative and a determination to improve the quality of accommodation for the residents. The appearance of the College is enhanced by the high standard of cleanliness provided by the cleaning staff.

#### **Commendation 32.**

The College is to be commended for the quality of its accommodation for residents and the ongoing maintenance programme which ensures that the rooms and facilities are upgraded, as necessary.

#### **Commendation 33.**

The members of the cleaning staff of the College are to be commended for the high standard of their service.

#### **4.1.2 Food Service**

The food service provided by the College is of a very high standard and is clearly appreciated by both residents and staff. The Head Chef demands high standards of himself and his staff and this is obvious in the products he delivers. The food menu is on a 6-weekly cycle and thus provides residents with a good variety and residents have the opportunity to have input into the menus. In addition, there is also home baking available, which contributes to the homely atmosphere in the College. The Head Chef is doing an outstanding job and strives to attain excellence at all times. There is good communication between the Head Chef and management, particularly with the Deputy Master and Conference Manager.

#### **Commendation 34.**

The College is to be commended for the high quality of its food service.

### **Commendation 35.**

The Head Chef is to be commended for his outstanding contribution to the College's food service.

#### **4.1.3 Conference activities**

St Margaret's College has an excellent reputation as a venue for conferences and meetings and hosts a large number during the year. This activity is not restricted to periods when the residents are on vacation. The College manages to provide conference and meeting facilities without dislocating the daily routine of the residents. There has been excellent feedback from University departments on the quality of the services provided and the University benefits from this. The Summer School administration has been grateful to be able to place its students as a group in such a favourable environment and hopes that this can continue on a permanent basis. The Conference Manager is widely regarded for the excellent service she provides.

### **Commendation 36.**

The College is to be commended for the high standard of its conference and meeting facilities which are used frequently throughout the year. In particular, the Conference Manager is to be commended for the high regard with which she is held for her efficiency.

### **Commendation 37.**

The College is to be commended for the mutually cooperative relationship it has with the University's Summer School, as a provider of accommodation for the School's students.

#### **4.2 The relationship of the College to: Communication and Marketing, Liaison Officers, University Alumni Office, Accommodation Services staff, other residential colleges and University departments**

The College has a strong relationship with all staff of the University's departments and services which was evident during the interviews with the Panel. This is testimony to the Master's leadership, communication and networking abilities. He appreciates the value for the residents by the College's association with these departments and services. These include Communication and Marketing, Liaison Officers, Alumni Office, Accommodation Services, other residential colleges and academic departments.

### **Commendation 38.**

The College is to be commended for its strong relationships with key University departments and services.

#### **4.2.1 Alumni Office**

The Alumni programme being implemented by the College is of a high standard and is facilitated by the University's Alumni Office sharing information on the College's alumni from its database. The Alumni Office staff spoke very highly of the Master, for his approach to Alumni matters.

### **Commendation 39.**

The College is to be commended for initiating the development of its alumni programme.

#### **4.3 The provision of appropriate information to residents and conference clients**

The College takes great care in providing useful information for its residents and conference clients. Indeed, the quality and detail included in its publications and website show the hallmark of excellence. Residents are provided with current information about the College by way of a Members' Handbook, notice boards, dining room announcements and interaction with staff. These are updated, as necessary.

### **Commendation 40.**

The College is to be commended for the high quality of its publications and website as sources of information for its residents and conference clients.

#### **4.4 Provision of information technology services**

The use of modern technology within the College is widespread. The Master seeks out expertise and is innovative. The College's IT Manager is very well-trained and has clear insight of his role and the needs of the College. He has good communication with management and has undertaken appropriate professional development courses, as required. The College is fortunate that all residents have access to wireless internet. The IT Manager is also responsible for the security of the College. The security of the College does not pose any problems

#### **Commendation 41.**

The College and its IT Manager are to be commended for the excellent information technology support which is available to all residents and staff.

#### **4.5 The procedures for dealing with health and safety issues**

All members of staff are familiar with the College's Health and Safety procedures which indicates that they have been trained adequately. The excellent Health and Safety procedures in place ensure a safe work environment.

#### **Commendation 42.**

The College is to be commended for its Health and Safety procedures.

#### **4.6 The role and effectiveness of the St Margaret's College Residents' Association Executive**

The Residents' Association Executive is an elected, voluntary body that attracts many residents with an enthusiasm and willingness to contribute to life in the College. The members of the Executive organise and run a large variety of activities which add to the enjoyment of leisure time for the residents. The commitment of the Executive is important in providing enjoyable and successful cultural, social and sporting programmes.

The Residents' Association Executive members are often the first point of contact between the residents and the College's staff. This informal pastoral role is not always acknowledged, and is not something that the Executive has been trained to provide. Perhaps it may be useful to advise newly elected members of the Executive about what they should do in these circumstances which may simply be to recommend immediate referral to the Welfare Staff. There is a hint of tension between the Welfare Staff and the Executive which may be partly the result of the lack of clarity in the role of the Executive, in terms of what it should do when residents seek advice from its members. It may simply be a matter of the staff and residents openly acknowledging the valuable role the Executive provides within the College (refer to Commendation 12). The matter of the Executive having the ability to impose fines needs to be addressed as well and the Panel favours its removal. The Panel believes the role of the Residents' Association Executive should not include disciplining the College's residents.

The Panel believes that the appointment of a mentor, possibly a College Fellow, to act as a sounding board or to provide advice to the Residents' Association Executive would be useful.

**Recommendation 4.**

That the College should relieve the Residents' Association Executive of any responsibility for imposing fines on its residents.

**Recommendation 5.**

That the College should give consideration to the appointment of a mentor to provide advice, as necessary, to the Residents' Association Executive.

## **5. *The College Council***

The Council of St Margaret's College is a committed group of people with representation from the University and the wider Dunedin community. It comprises people with particular skills who have been identified as having the wisdom and experience to provide the governance of the College. The expertise of the individuals has been of inestimable value to the Master as well as the College. The Panel concluded that the members of the Council are strongly supportive of both the College and its Master and that there is an excellent relationship with management. The members of the Council are obviously in touch with what is happening in the College and they participate in College activities as time permits.

The success that the College has achieved, and its well-deserved reputation for excellence, have been enhanced by the efforts of the members of the Council.

### **Commendation 43.**

The Council of St Margaret's College is to be commended for its major contribution to all aspects of life within the College, including its strong support of the Master.

## ***Appendix 1 – Members of the Review Panel***

Dr Colin Geary	Convener, former Head of the Department of Pathology and Deputy Dean of the Dunedin School of Medicine, and former Master of University College
Mr Bruce Cowan	Master of Salmond College
Mr David King	Former Warden of Carrington College
Mr Chris Addington	Master of University College
Ms Gretchen Kivell	Head of Abbey College
Dr Sarah Young	Senior Research Fellow, Department of Microbiology & Immunology, former resident of St Margaret's College, current College Fellow
Ms Beth Jackson	Review Secretary, Administrative Assistant of Academic Committees

## ***Appendix 2 – St Margaret’s College Review: Terms of Reference***

For each of the aspects below, the Review Panel is asked to investigate the quality and adequacy of the structure, management, services and activities of the College taking into account the following key features:

### **Ethos**, including

- the definition and appropriateness of the College’s Ethos
- the College’s academic, cultural, sporting and community programmes
- the College’s social programme and other events in delivering “the Otago Experience”

### **College Management**, including

- the appropriateness and effectiveness of the College’s management structure
- the leadership with regard to developing and maintaining the professional standing and reputation of the College
- the processes and procedures for consulting and liaising with employed staff, administration at the University, and other interested parties, and incorporating feedback into the College
- the processes and procedures for ensuring employee capability, including induction and mentoring of new staff, staff training and development, and staff performance review
- the processes for identifying, considering and responding to problems raised by staff
- awareness of Treaty of Waitangi obligations
- staff participation in and contribution to the community and to the University
- the effectiveness of the College’s financial management and links to planning
- the processes for developing a vision and making plans for the future
- the processes and procedures for implementing plans

### **Resident Welfare, including**

- Welfare Staff selection, training, mentoring and performance review
- the adequacy of pastoral care provided to residents
- the processes for identifying, considering and responding to problems raised by Welfare staff
- consultation and liaison with residents and incorporating feedback into the College
- the provision of care for residents with special needs
- resident discipline
- the provision of adequate care to residents from different cultures
- the relationship of the College to student support agencies: Chaplaincy, Student Health and Counselling, International Office, Māori Centre, Pacific Island Centre, Student Learning Centre
- the effectiveness of the College's academic programme, academic tutor selection

### **Core Services and Activities**

- the range and scope of the College's services and activities i.e., accommodation, food service, conferences
- the relationship of the College to: Communication and Marketing, Liaison Officers, University Alumni Office, Accommodation staff, Library, OUSA, Recreation Services, other Colleges, University Departments, University ITS, schools and conference attendees
- the provision of appropriate information to residents and conference clients
- the standard and adequacy of accommodation, including building, furniture, security, study facilities and study equipment
- facilities for residents with special needs
- the adequacy of Conference facilities
- the value of the grounds in enhancing the College environment
- provision of information technology services

- the procedures for monitoring and improving the quality of services and activities offered to residents and clients
- the procedures for dealing with health and safety issues
- the role and effectiveness of the Saint Margaret's College Residents' Association

The Review Panel will report to the Council of Saint Margaret's College (Inc).