

Report on the 2013 (1st annual) Educational Developers Caucus Institute

Alice Cassidy and Ruth Rodgers
November 19, 2013

We are grateful to all members of the EDC executive for their support, encouragement, and background assistance on so many things. Deb Dawson, Tim Loblaw, Paola Borin, Stephanie Chu, Erika Kustra and Jordanne Christie, thanks for everything, from start to finish.

i. Special note about planning:

As noted in our proposal (hence starting from mid-January), we were planning to hold the event at another institution, with a colleague (working on paid time through their position there) organizing all room bookings, equipment and food as part of their contribution to the Institute. We had made a block booking at a nearby hotel (without having to pay any kind of deposit). On May 7, our colleague was informed that the Institute could not be held at her institution.

We kept the dates the same since we had advertised widely at that point, we informed the EDC executive of the change, and we kicked into high gear to secure rooms on the UBC campus. Many thanks to Joanne Fox, Microbiology and Immunology for allowing free use of space and equipment in the Michael Smith Laboratories (MSL) Building and Sukh Mandeep, MSL, for making the bookings for us.

Next up was arranging catering for each day as well as space and a caterer for the special Tuesday night event. We worked up a new budget based on costs at UBC, informed the EDC executive, and looked into a new block booking location. It was a lot of extra work we were not expecting, and it also explains (1. Timeline) why we started the UBC arrangements relatively late.

Suggestion:

Future Institute facilitators should have logistical support at the institution it is held at for room bookings, food and other technical needs. If this is not available, be aware of the extra time and effort needed, and possibly budget for an additional consultant fee for the person(s) who do the local work to cover it.

A. Who came?

The Institute was open to everyone, whether an EDC member or not (at the same cost of \$200). People came from five provinces across Canada (various parts of BC, also Alberta, Quebec, Ontario and PEI.) We had also had one participant from the US, another from China and one who spends half of her time in BC and half of it in Japan.

A total of 38 people took part, with 19 per stream. People worked at 27 different universities, colleges and institutes; we also had a few participants unassociated with an institution. The variety of job titles was equally large and included doctoral students, associate professors, consultants, faculty or educational development specialists (and a wide range of equivalent titles), directors, deans, associate deans and research assistants.

B. Promotions:

We created a bookmark (2. Bookmark) to give out at the EDC general meeting held at the STLHE conference in Cape Breton, Nova Scotia in June. We are grateful to Hilary Baker, Durham College for bookmark design and printing, and Lisa Kerr for creating it in PDF format for this report.

We worked closely with the folks at STLHE head office on many administrative aspects of the Institute. Many thanks to Muriel McKay and Sylvia Avery for all their hard work, suggestions, and creative talents (many participants commented how beautiful the Certificate was; see E. Certificate.)

Since we were creating this as we went, we drafted various parts of the online advertising (3a. Web material) in stages, along with links for 3b. Important Dates (and a related 3c. Email to spread the word), 4a. Travel and Accommodation (with an updated link, 4b, after the discount date passed) and 5. Bursary information (see C. Bursary section immediately below.) This resulted in a lot of time spent by us and especially Muriel in adding, changing, updating as we determined that wording should be a bit different, or updating as we found out information (such as about the bursary) and deadlines for discount accommodation.

In addition to Muriel sending us the updated registration lists upon request, we created a table to track the numbers over time, from July 10 when registration opened, through to the first day of the Institute (6. Registration over time.)

Suggestions:

Using the templates in this report as a guide, have all your material ready from the start before asking Muriel to do the web posting. Check terminology (we used Experienced and Senior interchangeably; Senior is preferred). Future facilitators may decide to use Entry-level instead of Novice. Both of those terms have been used in previous half-day EDC Institutes associated with the annual conference.

As we approach deadlines (especially for accommodation block booking and for registration more generally) it would be good if someone like VC, Communications of EDC were 'on it'. The way we did it, we tweeted and posted to our own website or by email, and asked VC, Communications to send things out (often with a delay).

It would also be great if to have the updated registration lists sent to facilitators on a regular and ongoing basis without having to ask. Things got a bit tight near the end as new folks registered but we did not have their email address to contact them.

C. Bursary:

We started working with the EDC executive on May 18, with what we thought was the final decision about how it would work made on June 5. Those interested in a bursary emailed us, stating the reason for their interest in the institute, and their need for financial assistance. No "proof" of need was required—we opted to take it on faith that if people said they needed assistance, they did. A list was compiled on a first-come, first-served basis, with an eventual bursary disbursement of \$200 each (the amount of the Institute tuition) to 6 people. We had understood, hence had told bursary recipients that they would receive their cheques at the end of the Institute. However, on October 23, we were informed that bursary recipients would need to complete and submit an expense report prior to having a

reimbursement cheque mailed to them at their preferred address, after completing the Institute. Thus, this information was conveyed to bursary recipients just days before the Institute began.

Suggestion:

The 7. Bursary Process should be conveyed to applicants at the time of registration and posted to the web (i.e., that they need to pay the registration, then submit their e-receipt along with an expense report). If this is done at the time of registration, bursary applicants should be able to be reimbursed for their tuition at the Institute, once their attendance has been confirmed. It is also worth talking in advance to the EDC executive to clarify that people can get the bursary even if they are not EDC members.

D. Timing:

We planned the end time on the last day so that people from out of town need not stay over an additional night after the Institute. We had checked into flights to ensure that folks could leave at 2:30 on Day 3, and make a flight as far away as Halifax that day. These details were noted early on in the Important Dates link on the registration page.

Caveat:

Though many folks did take advantage of this, and appreciated it, others simply did not return the 3rd day. One participant, who left early Wednesday so missed all of Day 3, suggested that we make the 3rd day a full day so that people have to stay over that night (for out of towners this would have necessitated 4 nights accommodation instead of 3). See related notes under E. Certificate and F. Attendance.

Suggestion:

Though we told people that if they cancelled by a certain date, there would be a \$50 charge, we are not sure this happened (we think there were some cancellations before that date). Check with Muriel to ensure that this is being done for future Institutes. Also check, if people are paying by PayPal (as STLHE uses), how it might be possible to avoid additional charges to EDC/STLHE.

E. Certificate of Completion:

We drafted the kinds of information we thought should be on it, incorporating input from EDC executive and Muriel, who also sent us extra certificates with no name (5 per stream) so we could add names of anyone who registered after the certificates were mailed (and this was necessary). The template Certificates for each stream, and a sample with a name are 8a, 8b and 8c.

Suggestion:

Have all people signing do so digitally to prevent last minute rushing around or the issue of someone not being able to be there in person to sign. Send the certificates next day delivery or courier, as the vagaries of regular mail, coupled with internal mail systems at especially large institutions is stressful and unnecessary. (We did not get them until Day 2 so a little close for comfort!)

F. Attendance:

We noted on the online information that there would be evening events on Days 1 and 2. We emailed everyone with a detailed daily schedule of start and end times and lunch and dinner (on Day 1) breaks. We had (mostly locals) come and go a bit on some days, occasionally for something outside their control (medical appointment, child care issue) but for others, for something they had clearly arranged before but did not inform us. Several (mostly local) registrants came to only one, or none of the evening events (only one registrant contacted us beforehand about one evening when child care was just not possible; others just did not show up, or told us far too late to have changed food orders.) On Day 3, we had several not return, most of them telling us the day before. There was a dollar figure associated with some of these (Day 2 special dinner and Day 3 breakfast and lunch).

Suggestion:

Tell people up front (at time of registration) that they are expected to take part in all scheduled events – future facilitators might have the detailed schedule planned ahead of time and post that too – and state that you receive your Certificate of Completion only if you have done so. Future Institute facilitators should talk about how much time can be missed to still receive your Certificate – for example the evening activities, how much, if any of time during the day?

G. Budget:

We kept the budget submitted in the proposal updated with actuals, using this also to ensure that bills were all paid and everything reconciled. See attached budget. We made a profit of \$591.48, however \$222.80 of this was a result of left-over funds Alice had from an EDC grant. All in all, we were happy that we priced the registration accurately, to provide a good value to everyone. The goal was not to make a huge profit!

Related notes:

We originally talked about having a discount for students or have a draw (first 10 students who register entered into a draw for one free registration). We planned to revisit once we knew some non-negotiable costs, and I think that in getting the bursary up and running (for anyone, on a first-come, first served basis), as well as dealing with our second phase of planning (see i. Planning), we abandoned the idea of a different registration cost for students. It might be something to consider in the future.

Suggestion:

Work early with the folks who authorize and handle money both at EDC and STLHE. Some payments had to be made before the Institute started, to reserve a space or catering. This needs to be arranged early so that there are no surprises or need for explanation as to why something cannot ‘be reimbursed only after the Institute is over.’

H. Communication with registrants:

We created a 9a. Welcome email to send to everyone, and then added a 9b. Special insert to our individual streams, sending it out starting on October 7 and to each new registrant after that. The day before the Institute, we emailed everyone, with reminders about the start time and location, and a cell number should anyone need immediate help.

After the Institute was over, we created one excel file of all participants, the two of us, along with the panel guests (with the permission of all involved) and sent that out to everyone. Once all the Novice stream material was posted to <http://cassidyinview.wordpress.com/edc-institute-material/>, along with a gallery of photos of the whole Institute, another email was sent to everyone as folks in the Experienced Stream also wanted to be able to view it.

I. Extras:

For the first evening, we posted details of three restaurants on campus (having contacted them head of time) with each of us signing up for one of the choices, inviting those who would like to come along (no host) to sign up. We then contacted restaurants to confirm numbers for reservations.

We were able to secure a 15% discount at UBC Bookstore, located right next to the building in which our Institute took place; several folks told us they took advantage of this and were pleased about it. Thanks to Rebecca Irani, Marketing and Communications Manager.

J. Food:

On the registration form, we asked participants for any dietary restrictions, keeping a running summary (by name) of allergies and other food intolerances. This was used to guide our caterers, checking at several points including when food was delivered, and letting everyone know where the ‘special food’ was for those who had requested it.

We chose the Alma Mater Society (AMS Catering) at UBC, being happy with their service and food in the past, plus the facts that they are located right on campus (more sustainable in terms of transportation), and that they hire current students and alumni.



We chose Salishan Catering for the special Day 2 dinner, again based on prior good experience, and

that they do a traditional alder-smoked barbecued wild salmon with side dishes including bannock, done on the Musqueam style, with a special lactose-free vegetarian frittata for some of our participants.



Tip:

Having the summary of food restrictions (by name) was very helpful in making sure we got all the various combinations right! Work early with your caterers and keep in touch with them. It is important to stress that special food be labeled clearly and set aside from the other food. You also need to check this on the first (and really all) deliveries to ensure it is done the way you asked and expected.

The biggest thing to watch for is that special food such as vegetarian, lactose-free, etc. is separated and clearly labeled.

If you know from experience that a particular caterer provides ‘more food’ than is needed, for the numbers you ordered, you can modify. For example I knew that breakfast food is often left

over, so asked that it be left when they brought coffee and tea for the break.

K. Waste-free Institute:

This is almost impossible to do entirely, but we did all that we could, including the following, which we strongly encourage future Institute facilitators repeat:

- Suggest participants bring their own coffee mug and water bottle
- *Not* use bottled water but suggest that the tap is great
- Order juice to be served in bulk (in large pitchers)
- Ask that packaging be kept to a minimum and in bulk whenever possible (cream for coffee, dressing for salad, parmesan cheese, etc.)
- Order real dishes and cutlery for as many meals as you can afford – we did so for the 3 daily lunches and the special dinner (also cloth napkins for dinner)
- Have recycling and compost containers at the food areas and explain how to use them

L. Accommodations:

As our campus has only one kind of accommodation, WestCoast Suites, an all-suite hotel, at the time of year we held the Institute, we made a block booking, with a deposit paid to secure the number of rooms we expected to fill, via a signed contract (with the deposit returned if we reached 80% of that booking).

We sent out various emails and tweets as the deadline for deposit return got closer. We emailed registrants to see if they had booked and at the discount rate. We worked with WestCoast Suites to check if anyone booked but not at this discount (several had) to boost numbers.

Tip:

Keep in touch with your accommodations folks throughout the process – in the end we were just below the number we needed (as per the contract) but they returned our deposit anyway. We think the rapport built through constant communication helped.

M. Materials:

The Senior Stream was based on a booklet (see Overview of Senior Stream in N. Institute Activities below). Both streams needed the following material: Flipchart paper, Mr. Sketch, masking pens, tape, 3” post-it notes, 5x7 index cards, name tags (enough for participants and guest panel and facilitators), fun facilitator stuff such as squishy balls, playdough, molding clay, etc.).

We minimized the number of physical handouts, with some material for the Novice Stream posted to <http://cassidyinview.wordpress.com/edc-institute-material/> to refer to in some sessions, with more added afterwards (mainly to summarize co-created material and add references offered by participants).

N. Institute Activities:

Early on, we created 10. Schedule timing to help with details to give to caterers, and to help us plan our own lesson plans within streams. We kicked off the Institute with breakfast at 8:30am on Day 1 (Monday, Oct 28). We projected a slide with Deb’s smiling face and her message to the group as the very first item, followed by basics about the building, including safety-related (what to do in an earthquake, nearest exits) and who would be in which room. We also talked briefly about confidentiality.

There was unstructured time during each breakfast, coffee break and lunch for the two streams to intermingle.

In addition, both Day 1 and Day 2 evenings were times when structured activities connected the two streams.



Formative feedback was done on each of Day 1 and Day 2 (see 11a and 11b) and addressed at the start of each of the subsequent days, incorporating key suggestions and letting everyone know. For example, Day 1 formative feedback suggested that there be more time for intermingling of the two streams, so on Day 2, at breakfast we announced that we made the coffee breaks longer and suggested people talk to those they had not yet met. The Day 2 feedback was summarized for the whole group in the form of 'footsteps' that were viewed by walking a path into the breakfast room – just a little creative twist for the last day. We worked with Paola to create the 11c. Summative feedback, which she emailed out the day after the Institute ended. We have attached a summary of feedback received (from 23 participants.)



[An Overview of the Novice Stream](http://cassidyinview.wordpress.com/edc-institute-material/) (see files at <http://cassidyinview.wordpress.com/edc-institute-material/>):

- Opening/icebreakers
- Definitions and pathways related to educational development
- The start to an educational development portfolio, including a draft philosophy statement
- Core competencies in terms of skills, knowledge and attitudes
- Routes and resources for educational developers (including points of entry)
 1. Rapport-building
 2. Active listening
 3. The secret to our success (how do we do 'ed dev'; who do we serve?)
 4. Consulting skills and facilitation
 5. Networking
 6. Take action! (scholarship of teaching and learning, conference participation)
- Planning and leading educational development (including programs, resources, seminars; reflective practice and supporting faculty, grad students and others)
- Closure/reflection



A variety of facilitation techniques were modeled throughout the stream, incorporating the responses to the welcome letter queries by 1) Posting the questions people wanted to have answered then doing a check-in part way through to see how that was going, adjusting as needed; 2) running an Acronym Bingo game, complete with prize (a Green Guide) for the first full line; and 3) having participants contribute ideas for the scenarios, through a group and individual

flipchart work, including a value line to form groups, a 'flip-chart stations' activity, a role-play done in goldfish bowl /theatre sports style with 'the bubble over my head' added in, and group discussion.



Some activities and topics overlapped; for example, a group brainstorming at the start of Day 1, "For this Institute to be a success...", stayed up on a flipchart throughout the Institute, returning to it as one of 10 'stations' for participants to visit, checking off which ones had been met (and making sure to address any that had not); and the prompt "What workshops, programs and resources do you offer?" was used for Active Listening. We had a semi-structured walk outside on each of Days 1 and 2 after in the mid-afternoon.



An Overview of the Senior Stream:

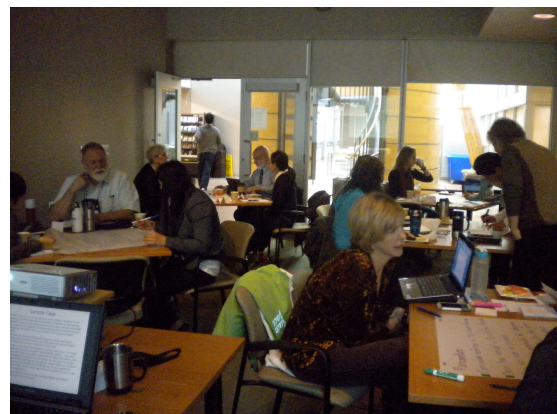
There was a focus on building advanced facilitation skills among a group of experienced educational developers. These skills were NOT those needed to facilitate educational development workshops (which every participant

already had) but were instead the kind required to support more comprehensive processes such as strategic planning, problem solving, visioning, conflict resolution etc. The itinerary was built from Ingrid Bens' *Facilitation at a Glance!* pocket guide (3rd edition), which was given to participants as part of their registration.

Tip: Changing numbers of registrants in this stream as the dates approached prompted the ordering of additional guides. It might be best for material that has to be ordered, to aim for the maximum number needed if we reach full capacity, determining also, with the EDC executive, a policy to be reimbursed for any booklets that are not used.



The learning process included a wide variety of individual and group content and practice activities designed to build skills in all areas of facilitation (planning, design, delivery, troubleshooting). Participants reviewed and applied almost all sections of the pocket guide in the first two days, gaining knowledge of a rich resource of facilitation processes as a result.



On the third day, each small group designed a mock scenario based on their own real experiences. Each resulting case was then addressed by another group, which designed an appropriate facilitation plan that integrated all stages and aspects of an advanced facilitation experience, and presented their solution to the whole senior stream group. This consolidation activity was deemed very helpful in synthesizing the many aspects of advanced facilitation, according to the feedback received.



Tip:

Future Institutes may repeat core skills in the Novice Stream, updating resources and activities as needed, continuing to incorporate results of a brief needs assessment sent to registrants beforehand. The Senior Stream might focus on a variety of advanced/specialized skills in future years (facilitation skills, which was the focus in 2013, may be of interest again in 3-5 years). The suggestions for both streams in the Summative Feedback summary (attached) will be valuable to future planners.

O. Full-Group Activities

Speed Sharing Activity:

On the first evening, both streams were invited to return after the dinner break, to engage in a 'speed-sharing' activity, designed to provide an opportunity for novices to 'interview' senior educational developers. The questions (see below) were provided to the Senior Stream in the afternoon of the same day, and a short time provided for preparation of their answers.

The room was set up in two long rows of tables with facing chairs. Novices sat on one side, facing senior developers on the other. Copies of the prepared questions were provided on the tables. The first question was discussed for ten minutes, and then we requested that novices move one seat to their left to encounter a new developer. The first question was repeated with these new pairs for another ten minutes. This process was repeated eight times, so that each of the four questions was discussed twice.



This activity was highly valued (according to feedback received), especially by the novices, as it provided a concentrated time with a wide variety of experienced developers providing invaluable information. The experienced developers saw it as an opportunity to consolidate their own thinking and provide mentoring to emerging professionals.

Questions for speed sharing activity:

Question 1 (2 rotations of 10 minutes each= 20 minutes plus changeover)

What attracted you to the field of educational development? What are its greatest rewards and challenges?

Question 2 (2 rotations of 10 minutes each= 20 minutes plus changeover)

What resources/experiences/networks have you found most useful in developing your own ED

practice? Where can these be found and how do you use them?

Question 3 (2 rotations of 10 minutes each= 20 minutes plus changeover)

What is the resource you recommend most often to faculty in need of information about teaching/learning?

Question 4 (2 rotations of 10 minutes each= 20 minutes plus changeover)

What educational theorist has had the most influence on you in your educational development practice? In what ways does this influence show up in your ED activities or experience?

Tip:

Although we had planned for two hours for this activity, people were tired and the sound level in the room was very high with all people talking at once. Thus, we shortened the rotations slightly, ending the activity within 90 minutes. We would recommend this shorter time for evening activities, especially at the end of day one when registrants may be jet-lagged and a bit overwhelmed with the intensity of the first day. We found that a 5-7 minute time frame was sufficient for the discussion of each of these questions, though there was no lack of other useful topics under discussion during each ten-minute rotation!

This activity was enjoyed by the more extroverted participants, but was somewhat stressful for more introverted people who found the pace and noise level quite tiring and difficult. In future, it may be good to keep it a bit shorter, and space participants out as much as possible in the largest room available to control the noise level and provide more privacy/intimacy in the discussions, as well as 'save voices' so folks don't have to speak over the din.

Another outcome of the speed-sharing panel was to create a 12. Mentoring Wishes and Offers document that was shared with all participants by email afterwards, as well as with the new Mentoring Action Group within EDC.

Interactive Panel Activity:

On the second evening, we were joined by a panel of invited guests, which included directors, senior educational developers, and administrators from various teaching/learning centres across the province. We brainstormed our invite list and sent it out early (see 1. Timeline and 13. Guest Panel Invite). We are extremely grateful that these skilled and busy people took the time and (for some) considerable expense to join us for the evening and share their collective wisdom.



We extend our sincere thanks to our panel members: Karen Belfer (Vancouver Community College), Judy Chan (University of British Columbia), Stephanie Chu (Simon Fraser University), Teresa Dawson (University of Victoria), Isabeau Iqbal (University of British Columbia), Liesel Knaack (Vancouver Island University), Eric Kristensen (Educational Developer), Alice Macpherson (Kwantlen Polytechnic University), Vivian Neal (Simon Fraser University), and Bill Owen (University of Northern British Columbia).

The topic for consideration at this event was “facilitating and managing change.” Panel members were emailed the questions several weeks ahead of time. Our intent was to explore both the positive and negative effects of change for both individuals and organizations. Thus, our questions were as follows:

Question 1:

Describe a time when, as an educational developer, you had to cope with unwelcome changes in your department/practice/funding/institution. What were your most effective coping mechanisms, or what lessons did you learn from that experience? What underlying principles (if any) regarding change management did you develop from that experience?



Question 2:

*What do you feel is the MOST important skill an ED needs in order to be effective at supporting change in **individual faculty**? How is this skill best used?*

Question 3:

*What do you feel is the MOST important (ongoing) thing an ED or Director can do to facilitate **institutional change** in terms of supporting/maintaining excellence in teaching/learning?*

Question 4

Describe your best success story in terms of supporting/implementing change in your

institution. What do you think were the three most critical factors in your success?

The room was set up with round tables seating eight people each. Our guests were divided among the tables for dinner (see J. Food). Once coffee/tea and dessert was served, the activity began. Each table discussed question one for twenty minutes with the one or two guests seated at their table. At that time, the guests moved to the next table, and a discussion of question two began. This process continued, with twenty minute rotations of guests and questions, for approximately 90 minutes overall. In this fashion, Institute participants had extended conversations with approximately eight different very experienced educational developers, and had the chance to establish many valuable network contacts in addition to thoroughly exploring the topic of change in the educational development field.

This event was considered extremely valuable (according to the feedback received) by all attendees including our guests, who relished the opportunity to get together with their peers and fulfill an important mentoring role for educational developers from across the country. They emphasized that they thought that it was a good use of their time and resources.

P. Certificate ceremony

In the last half hour of Day 3, everyone gathered for the final act. Mixing up the Certificates amongst Novice and Senior Streams, we presented the first Certificate to one ‘at the top of the pile’ then handed them all to her and asked her to read the next name, and so on. This way, one last collaboration took place.

We then gave out index cards and pens, asking people to write one word to describe what the Institute was for them. The group photo shows them holding their Certificate and their card –

some drew pictures, others used words – see the close-ups!

Q. Closing Words

We were honoured and felt privileged to have been able to design and lead this first Annual EDC Institute and hope there will be many more to come.



Our hope is that this report and associated templates will help others in these pursuits. We were very much designing as we went and found that open lines of communication, not only between the two of us (many many emails, regular Skype meetings, some phone calls), but also with the EDC executive and with Muriel and Sylvia was so very important.

We were pleased with the feedback from both formative and summative. We take from these, informal conversations during the Institute and emails from participants afterwards, what a powerful experience it was and what a great network was formed in the communications leading up to, during the 3 days, and afterwards.



Photos were taken with, and shared with permission. Photo credits: Emma Bourassa, Alice Cassidy, Lianne Fisher, Luis Guadarrama, Terry Knutson, Alison Jeppesen, Frank Rodgers, Ruth Rodgers