

Educational Developers Caucus Grant – Fall 2015 Proposal

Title: Investigating the Experience and Impact of Strategic Planning in University Educational Development Centers: A Case Study

Contact Information:

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Co-Investigators:

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Project Mini-Description:

Our project is designed to investigate the portfolio approach to strategic planning that has recently been implemented within the University of Calgary’s Educational Development Unit. The purposes of the study are (a) to evaluate the effectiveness of the portfolio-based strategic planning process; and (b) to investigate staff and faculty member experiences of the portfolio approach to strategic planning.

Full Project Description:

Introduction and Rationale

Strategic planning is typically defined as “a process of anticipating change, identifying new opportunities, and executing strategy” (Voorhees, 2008, p. 79); it is commonly perceived as an organization’s approach to articulating identity and purpose (Bryson, Anderson, & Farnum, 2011). This type of planning is considered to be an essential process at universities (Cook, 2010), one that is required for post-secondary institutions to “grow and prosper” (Fathi & Wilson, 2009, p. 91). Most strategic planning processes, however, are adopted from corporate domains (Ellis, 2010)—with little research evidence to support the efficacy of these models within post-secondary environments (Mueller, in press). Furthermore, educational development centers have traditionally been at the periphery of centralized strategic planning processes (Gibbs, 2006). Such centers now find themselves

facing requirements to plan, without the benefit of any established process that adequately fits educational development contexts and purposes.

The Educational Development Unit (EDU) at the University of Calgary's Taylor Institute for Teaching and Learning has engaged in a process that explicitly merges research evidence and wisdom of practice (Weimer, 2001) for the purpose of establishing a living strategic plan. In light of the importance of portfolios in the discipline of educational development, we have called this process a portfolio of practice approach to strategic planning. This portfolio of practice approach allowed the EDU to devise, reflect on, and document educational development in an inclusive and collaborative manner, and provided the staff and faculty members an opportunity to create a strategic plan that is well-evidenced, contextually driven, and practically applicable to day-to-day work.

Purpose and Method

The purpose of the study is two-fold: (a) to evaluate the effectiveness of the portfolio-based strategic planning process that has recently been implemented at the EDU; and (b) to investigate EDU staff and faculty member experiences of the portfolio approach to strategic planning. The following research questions will be explored throughout the case study:

1. What impact does the portfolio approach to strategic planning have on educational development workplace culture, climate, and relationships?
2. What impact does the portfolio approach to strategic planning have on educational development practice and achievement?
3. Does the portfolio approach to strategic planning meet its intended purposes?
4. How do educational development staff and faculty members experience the portfolio approach to strategic planning?

A multi-method case study will be used to investigate the implementation and impact of the portfolio approach to strategic planning. A case study is an ideal strategy for researching an applied instance of a particular phenomenon in a specific context (Gall, Gall, & Borg, 2010; Miles, Huberman, & Saldaña, 2014). In this case, it is the application of the portfolio approach to strategic planning at the University of Calgary's Educational Development Unit (EDU) that is of interest. The case study will be limited to the EDU staff and faculty members who were present throughout the entire strategic planning process (July 2014 – September 2015). Additionally, the processes and artifacts examined as part of the case study will be those produced by the EDU's Strategic Planning Committee during the same time frame.

Episodic narrative interviews, discourse analysis, and collaborative evaluation research will be employed as specific methodological tools to generate data throughout the case study. Episodic narrative interviews will generate in-depth narratives about personal experiences of the portfolio approach to strategic planning. The discourse analysis will focus on investigating the meanings within several types of written texts that were generated as part of our strategic planning process, including meeting notes, documentation from strategic planning retreats, and our formal strategic planning document. Finally, the collaborative evaluation research portion of the case study will take the form of a world café, which will be structured to generate collective feedback about the structure and implementation of the portfolio of practice planning model.

Significance and Outcomes

Strategic planning effectiveness is not well-evidenced generally, and it is particularly ill-understood in the contexts of higher education and educational development. Most discourse about strategic planning in universities borrows heavily from corporate understandings, positioning higher education institutions as businesses vying for competitive advantage (Fathi & Wilson, 2009). This positioning is a poor match for the purposes of higher education and, more specifically, those of educational development. There is some indication within strategic planning literature that planning processes should be modified given unique contextual demands (Bryson et al., 2011), but there is little description of what this might look like, or how it might work.

Given the relative absence of research, evidence, and practical models that focus on strategic planning in educational development, this inquiry will contribute to a substantive gap in understanding about how strategic planning works in higher education. In addition, the research will have pragmatic significance; the results will not only influence the Educational Development Unit's ongoing planning process, but will also serve as a model for strategic planning in post-secondary educational development centers nationally and internationally. This project is in direct alignment with the EDC's Living Plan, particularly with respect to the themes of *organizational development* and *developing leadership skills*. We have offered a handful of presentations, at EDC and STLHE conferences, that have outlined the process of implementing a portfolio of practice approach to strategic planning, and these have been met with a robust interest from teaching and learning centers across Canada. There is a pressing need for pragmatic, accessible planning models that align with educational development practices.

The research team will publish the results of this study in academic journals, and will also make the portfolio of practice model and accompanying resources widely available to other educational development centers. EDC and STLHE conferences (particularly pre-conference workshops) will provide one avenue for the dissemination of these resources, but our research team has also strategized creative ways to make materials available that will effectively leverage social media as well as open access web-based content. One of these strategies involves publishing the EDU's strategic plan as a "living" and evolving ePortfolio, which is currently in progress and will be refined throughout our research project. We also plan to develop a corresponding user's guide for the portfolio approach to strategic planning, and we will seek publication of this guide as a STLHE Green Guide in order to ensure broad access.

Timeline:

Our strategic planning research project will be implemented over a one-year period, spanning from December 2015 to December 2016:

- December 2015 – January 2016: Interview data collection
- January 2016: Collaborative evaluation world café and data collection
- February 2016 – July 2016: Interview transcription and analysis; world café data analysis; discourse analysis

- August 2016 – December 2016: Development of social media and web-based strategic planning resources; development of user’s guide; co-authoring of EDC and STLHE presentation proposals; co-authoring of peer reviewed publication

Budget:

We are proposing an EDC grant to **partially subsidize** the expenses involved in implementing our research project and producing a strategic planning user’s guide.

Item Description	Amount
EDC grant: Graduate student research assistant <ul style="list-style-type: none"> • 12 hours per week at \$25.00 per hour (benefits included) • 10 weeks, February 2016 – April 2016 • Data analysis • Develop user guide structure and conduct literature review 	\$ 3000.00
SSHRC Insights Development Enhancement Grant (University of Calgary): Graduate student research assistant <ul style="list-style-type: none"> • 12 hours per week at \$25.00 per hour (benefits included) • 3 weeks, December 2015 – January 2016 • Interview data collection and transcription 	\$1000.00
In-kind contributions <ul style="list-style-type: none"> • Research assistant office space, computer, and supplies (Educational Development Unit) • EDU research assistant support: approximately 5 hours per week, May – September 2016, primarily to support discourse analysis 	
Total EDC grant amount requested	\$3000.00

Agreements

I/We agree to provide the EDC community, who funds this grant, with access to resulting information and resources for which the copyright remains with the author(s).

I/We acknowledge that I/we will submit an interim report and a final deliverable (as described below).

References

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