Building a Strategic Plan that Guides Assessment: A Case Study from a Teaching and Learning Center

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Abstract

In this article, we make the case that a well-crafted strategic plan can guide the overall assessment of a center for teaching and learning. A strategic plan enables a center to assess holistically the degree to which it achieves its purpose and aligns with institutional priorities. Adoption of this approach enabled our center to collect assessment evidence that was relevant and meaningful given the center's purpose, context, and priorities. In this case study, we describe how the Schreyer Institute for Teaching Excellence, Penn State's center for teaching and learning, clarified its vision and mission and used the strategic planning process to transform our daily work as well as the way we assessed and reported our center's success. The identified strategic goals served to guide the day-to-day work of its educational developers and design programs that moved the center forward.

Key Words

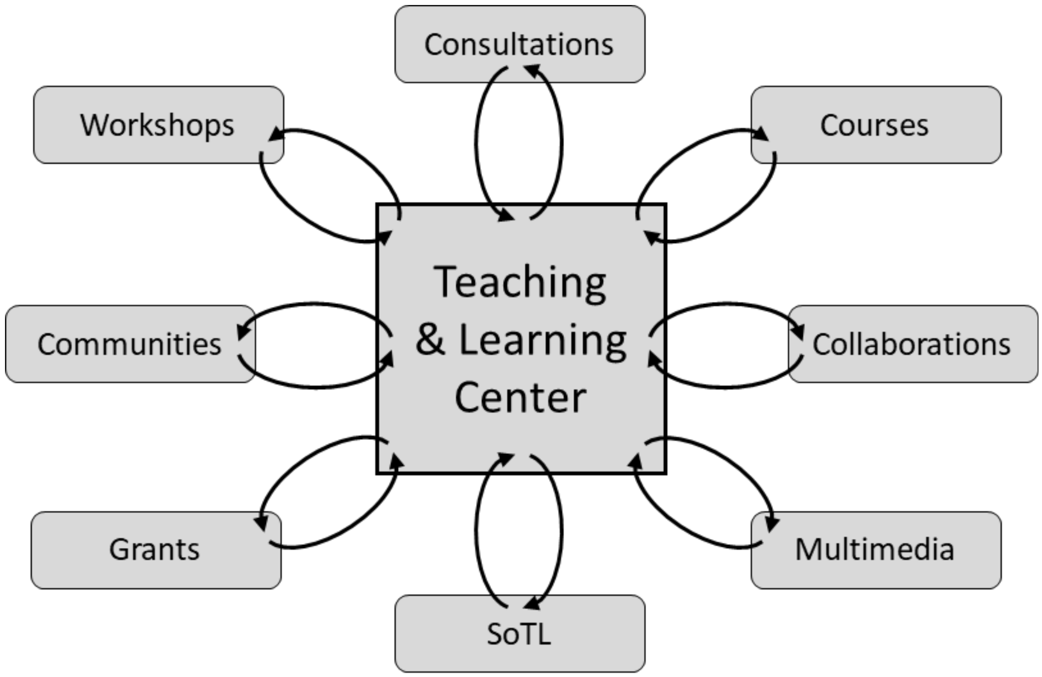
Center assessment, strategic planning, center visibility

Center Assessment Challenges: Review

Questions and concerns about assessing the work of CTLs and educational developers is a constant in the field of faculty, instructional, and educational development (Beach et al., 2016; Bothell & Henderson, 2004; Chism & Szabó, 1997; Drake, 2012; Ferren & Mussell, 1987; Hurney et al. 2016; Sutherland & Hall, 2018; Wergin, 1977; Young, 1987). Many CTLs develop objectives and outcomes (Brooks et al., 2011; Hurney, 2015; Hurney et al. 2016; Kelley, 2014; Plank, 2011, 2013; Plank & Kalish, 2010; Little et al., 2013; Rohdieck et al., 2015) to assess offered programs and other services (Moya et al. 2018; Postareff et al., 2007; Stes et al., 2010). Given that provision of programs or workshops is almost a universal function of CTLs, considerable assessment effort focuses on the programs offered by the center (Kolomitro & Anstey, 2017; Kreber & Brook, 2001; Stes et al., 2010; Sutherland & Hall, 2018). The most common data used to assess programs are participation counts (Godert & Kenyon, 2013; Kreber & Brook, 2001; Kuhlenschmidt et al., 2010; Yee & Friedman, 2015) and client satisfaction surveys (Bowdon et al., 2012; Chalmers & Gardiner, 2015; Chism & Szabó, 1997; Kucsera & Svinicki, 2010; Smith, 2011, 2012; Trigwell et al., 2012). These data may be compiled in annual reports or aggregated across multiple years (Chechowich et al., 2015; Hines, 2009, 2011, 2012, 2013; Kolomitro & Anstey, 2017; Figure 1).

Such data are necessary (Kelley, 201 4; Young, 1987) and important for demonstrating that the center is used and valued, but may be insufficient to fully demonstrate overall center success (Hurney et al., 2016; Hines, 2017; Yee & Friedman, 2015), particularly to executive

Figure 1. Center assessment as an aggregation of assessments of the programs or services offered by a center.



administration. This possible insufficiency may have prompted interest in holistic assessment of educational development units, which is relatively recent in the field (Beach et al., 2016; Chalmers & Gardiner, 2015; Ellis et al., 2018; Fink, 2013; Hines et al., 2015; Hoessler et al., 2015; Sutherland & Hill, 2018; Wright, 2011). This interest is reflected in widely cited publications such as Beach and colleagues' (2016) *Faculty Development in the Age of Evidence,* and *Defining what Matters: Guidelines for Comprehensive Center for Teaching and Learning (CTL) Evaluation* (Collins Brown et al., 2018).

The purpose of this article is to offer a systematic approach for assessing educational development units that can be adapted for use by different size units with diverse purposes at all types of institutions. For simplicity, we refer to these units as Centers for Teaching and Learning (CTLs), but this terminology is inclusive of centers-of-one (or less-than-one), medium and large centers, as well as units that encompass educational technology or student support. The adaptability of this approach is its reliance on a process that most CTLs already do—strategic planning—but which is rarely used to guide center assessment. At its core, an effective strategic plan not only guides a program's priorities and activities, but also prepares organizations for future assessment of its achievements.

We were prompted to write this article for a variety of reasons:

- clear interest among the educational development/CTL community for additional and holistic approaches to center assessment (Collins-Brown et al., 2016; Collins-Brown et al., 2018; Chalmers & Gardiner, 2015; Ellis, 2015; Hines et al., 2015);

- need for assessment evidence that can demonstrate relevance and achievements to executive administrators and other stakeholders (Bamber & Stefani, 2016; Beach et al., 2017; Bothell and Henderson, 2004; Brew, 2007; Godert & Kenyon, 2013; Moya et al., 2019; Schroeder, 2011; Siering, 2015; Winkelmes et al., 2010; Woodard et al., 2010);

- the challenge of interpreting and assigning meaning to common data collected by many CTLs (Milloy & Brook, 2004; Rener, 2010; Weinstein et al., 2011);

- the need for center assessment models that are efficient and adaptable to the highly varied expectations and structures of CTLs (Bamber & Anderson, 2012; Kolomitro & Ansty, 2017; Kuhlenschmidt, 2010; Kuhlenschmidt et al., 2010; Ortquist-Ahrens et al., 2011; Stefani, 2011; Weinstein et al., 2011); and

- need for an affirmative to response to criticisms of CTL reliance on participation counts and satisfaction surveys (Chalmers & Gardiner, 2015; Chechowich et al., 2015; Chism and Szabó, 1997; Hansen, 2013; Hines, 2013; Hoessler et al., 2015; Hurney et al., 2016; Kolomitro & Anstey, 2017; Meixner & Rodgers, 2013; Rohdieck et al., 2015; Yee & Friedman, 2015).

Our intent is not to criticize or challenge other approaches used by CTLs, but rather to respond to ongoing requests from the educational development community for guidance on how to conduct an overall center assessment. If a center is using an approach that works well, we do not suggest that the approach be abandoned or that our approach is superior. This approach will be particularly useful for CTLs that have not previously conducted a center assessment, but do have a strategic plan.

A CTL can use its strategic plan to assess how well the organization *as a whole* is achieving its purpose. Too often strategic plans are not valued, but rather “a document that sits on a shelf gathering dust” (Gano-Phillips, 2011, p. 227). Rather see the planning process as a waste of time, we suggest that a strategic plan is the ideal foundation on which to build a CTL assessment because the plan is, by design, centered on the core purpose of the unit and is intended to be used to guide decisions and lead to future success.

The approach we describe here is founded on successful implementation of traditional strategic planning by the Schreyer Institute for Teaching Excellence, Penn State’s CTL (hereafter referred to as the Schreyer Institute or SITE). By traditional strategic planning, we mean the time-tested approach that originated in the corporate sector in the 1970s (Drucker et al., 2008; Collins & Porras, 1996), which has been successfully adapted to non-profit, government, and education sectors (Bryson, 2017; Delprino, 2013; Hinton, 2012; Ruben, 2007). Our approach excludes some of the least productive approaches to implementing strategic planning in higher education, such as top-down (rather than unit-centered) planning, not acting on the plan, and putting too much emphasis on metrics (Eubanks, 2017).

This article has three main sections. We begin with a brief overview of strategic plan elements, with explicit definitions from the literature, as well as strategies other CTLs can use to guide their own planning and center assessment. We then briefly explain how our center realized the value of strategic planning as a guide for center assessment. Finally, using one part of our strategic plan as an example, we walk readers through the process of how our plan led to decisions and actions, as well as targeted data collection to demonstrate success.

Strategic Planning as a Guide to Center Assessment

When center assessment is directly linked to a strategic plan, CTLs do not need to abandon or apologize for using counts and surveys to assess the use and quality of their programming. Rather a plan provides context for these and other data that provide meaning and demonstrate that its programming has achieved an intended purpose. Hines (2017, p. 2) identifies five primary obstacles to educational developers “adequately evaluating the worth and merit of their programs,” including misguided evaluation mindsets, weak infrastructure, ill-conceptualized curricula, fuzzy goals and short-aimed missions, and ill-conceived evaluation frameworks (Hines, 2015, p. 5). We are confident that using a strategic plan to guide center assessment helps eliminate or avoid many of these obstacles.

In other words, a holistic center assessment guided by a strategic plan can inform decisions about which individual programs and initiatives a center *should* be offering, as well whether it is adapting to changing priorities and needs (Bamber & Stefani, 2016; Bowdon et al., 2012; Godert et al., 2010; Mathieson, 2011; Siering, 2015), such as those prompted by the 2020-2022 coronavirus pandemic.

Strategic Planning Definitions and Elements

Before we continue with details of our center's assessment approach, we want to introduce and define our terminology. Strategic planning has been practiced for decades and has its roots in systems theory and organizational management practices in the 1950s (Barker & Smith, 1997; Steiner, 1979).

Strategic planning is "a deliberative, disciplined approach to producing fundamental decisions and actions that shape and guide what an organization (or other entity) is, what it does, and why" (Bryson, 2017, pp. 18, 33). Ruben (2001, p. 50) notes that a "fundamental purpose of the planning process is the translation of the mission, vision, and strategic directions into plans, measurable goals, and action steps."

At minimum, strategic plans have three key elements: vision, mission, and goals. We use the following definitions compiled from a number of sources (Bryson, 2017; Collins & Porras, 1996, 2005; Delprino, 2013; Eden & Ackerman, 1998; Hinton, 2012; Ruben 2007, 2010).

Vision: A vision statement describes an idealized future for an organization. It reflects the organization's core identity, assigns meaning to individuals' work, and focuses on the future.

Mission: A mission statement conveys why an organization exists and defines its purpose. It refers to the primary work of the unit and anchors its daily activities. It helps leaders make decisions about where to put efforts and resources.

Goals: Goals are desirable results. They reflect where the organization is in its evolution and what it will do to advance its mission. Goals are prioritized targets that drive actions to allow assessment of progress.

Ideally, vision and mission statements should be concise and memorable in order to inspire and guide the work of the organization. However, as strategic planning has become commonplace, the standardized definitions above may be replaced with intuitive understanding of these common terms. Using intuitive or non-standard definitions can lead, as it did in our CTL, to a vision statement that is a goal and a mission statement that is ungainly and hard to remember (Figure 2; left column).

Strategic goals answer questions such as "What will we improve?" and "How will we know?" Typically, strategic goals are framed to be specific, measurable, achievable, relevant, and time-limited (i.e., beginning/end). These are typically called "SMART Goals." The SMART goals mnemonic is widely recognized in higher education, although its use is not confined to strategic planning.

We stop at the goal level for a number of reasons. The purpose of the definitions above is to demonstrate that there are standardized definitions of these terms and let readers know how we use these terms in the rest of the paper. Most strategic plans in higher education, specify multiple levels below goals. Examples of the labels used for levels include objectives, outcomes, strategies, key performance indicators (KPIs), targets, action plans, metrics, and initiatives. These terms vary by institution. Some change with each new strategic plan while others reflect

Figure 2. Comparison of early and revised strategic plans. The early objectives were difficult to assess and led to counting and presenting everything, which were uninterpretable. The revised goals are specific, measurable, achievable, relevant, and timely.

Schreyer Institute for Teaching Excellence

Early Vision

To become recognized for the leadership, partnership and individual expertise that our diverse staff provide to the teaching and learning initiatives with the faculty, academic units, peer institutions and other scholarly organizations.

Early Mission

Organizationally within Undergraduate Education, the Institute has University-wide responsibilities to promote and provide opportunities for the sharing of knowledge gained about the teaching and learning process; promote the combined uses of effective educational testing, learning assessment instruments, and teaching effectiveness feedback as important to the improvement of student learning; and promote sound teaching practices to enhance student learning.

Early Objectives

1. Promote and support efforts to develop, enhance, and disseminate instructional knowledge and skills.
2. Help faculty engage all students in learning.
3. Foster definition, identification, and documentation of student learning.
4. Enhance the value of teaching excellence among all members of the university community.

Revised Vision

The vision of the Schreyer Institute is for all Penn State students to be engaged in and responsible for their own learning by means of excellent teaching.

Revised Mission

The mission of the Schreyer Institute is to advance and inspire excellence in Penn State's teaching and learning community.

Processes

Who: anyone involved with Penn State students in an instructional context

What: use effective teaching methods; engage *all* students in learning; effectively assess student learning; enhance the value of teaching excellence; inform decision-making about teaching and learning

How: Consultations; Grants; Collaborations; Research; Publications; Observations; Workshops; Conferences; Testing & Scanning; Committee service

Revised Goals

1. Visibility. Increase our visibility as one of the primary sources of information and help with teaching and learning innovations and challenges.
2. Impact. Increase knowledge and effective use of Schreyer Institute teaching and learning resources.
3. Quality. Deliver high quality information, services, and materials using efficient and effective processes.

the preference or experience of the central administrator. We recommend that each CTL follow the framework used at their institution.

Most educational developers are adept at adapting their terminology to that used by their clientele, which prepares them to adapt their strategic plans to align with the definitions, terms, and levels used in their institution.

That said, we recommend reserving objectives and outcomes for student learning, and goals for strategic planning. This practice serves to distinguish assessment of student learning from center assessment. It also differentiates goals set by instructors and programs *for their students* from goals as statements of future achievement identified by the CTL *for itself*. While the term 'goal' appears in higher education, it is typically used less formally than are 'objective' and 'outcome' so it seems best to reserve the latter for student learning assessment.

Some CTL directors have been told that the purpose (mission) of the center is to 'improve teaching and learning'. While this stated purpose is understandable in a general way, improving teaching and learning are insufficient either as a mission statement or as a goal, for two reasons. First, if a center does not have authority over faculty and students, it cannot be responsible for their improvement or lack thereof. Educational developers have direct control only over their own actions. For example, they have control over whether programs and materials are relevant and of high quality, whether programming is physically and intellectually accessible to constituents, and personnel are knowledgeable and credible. Second, improving teaching and learning are too general to serve as a strategic goal. While teaching and learning improvement is *relevant* for a CTL and both are *measurable*, neither is *specific*, *achievable*, or *time-limited*. If your CTL has been told that its purpose is to 'improve teaching and learning', we do not recommend disputing that. Instead, we recommend translating this idea into processes or practices over which the CTL has authority and control.

The Strategic Planning Process

The planning process used by our center is based on the Excellence in Higher Education (EHE) framework developed by Ruben (2001, 2007, 2010) and the National Association of College and University Business Officers (nacubo.org). The EHE model is adapted from the Baldrige Performance Excellence Program developed by the National Institute of Standards and Technology (nist.gov/baldrige). Our process relies on four key steps drawn from the EHE process (Ruben, 2001):

1. Define organizational vision
2. Define organizational mission
3. Establish processes (who, what, how, when)
4. Set short-term and long-term goals

When steps two and three above are not clearly differentiated, mission statements can become ungainly. A mission statement is easier to remember when *who* the organization serves and *what*, *how*, and *when* it does its work are removed from the mission statement, and accompany it instead (Weinstein et al., 2011). In sharing this model with other organizations, we have had success helping CTLs unearth their core mission by suggesting that they cross-out references to *who, what*, *how*, and *when* in the current mission (e.g., Linse & Hood, 2015). Typically what is left is a concise and meaningful mission statement. For other centers, as with our early mission (Figure 2, left column), the exercise reveals the absence of a core purpose. Our new vision, mission, and goals (Figure 2, right column) follow the four-step process above.

Case Study: Using the Strategic Plan to Guide Center Assessment

For most of its history, our CTL approached center assessment like many others—we reported data that showed how we spent our time and the use of center services through counts of participants, workshops, consultations, and average client satisfaction scores. The Schreyer Institute for Teaching Excellence provided this evidence in annual reports to our executive administrator the Vice President and Dean for Undergraduate Education. Implicit in this practice were two assumptions: 1) that the available data were what *should* be reported, and 2) these data were meaningful. In other words, just because we had always collected these data they were not, by default important. The strategic planning revision process revealed that rather than reporting what we should, we were reporting data we had.

Without the guidance of specific achievement goals, the data we reported were challenging to interpret. For example, one year we reported 73 workshops with 490 unique participants. Absent a goal of increasing participation in our workshops, those numbers were not necessarily evidence of success. In another year, we reported an average rating 3.5 (out of 4) for the overall quality of our workshops. The score is gratifying, but not necessarily useful without being linked to a goal directed at quality improvement. One year we reported a 25% increase in consultations with engineering faculty, this increase served as evidence of success only when coupled by a goal to reach more engineering clients. Without a goal, the increase could have been attributed to chance or to the actions of the college.

The strategic planning process led us to identify our aspirational vision (our ideal state) and specify a meaningful mission (our purpose and reason we existed). It provided a way for us to identify goals that were relevant given where we were in the evolution of our center and reflect our and Penn State's current priorities. These goals guided decisions about our time and effort, our programming and how we used our funding. We reexamined our programs and practices, revised assessments, reviewed data and reports, and questioned whether what we reported was valuable for stakeholders and constituents. Ultimately, these goals formed the basis for assessing whether we were successful in meeting our mission.

The remainder of this article is dedicated to walking the reader through the Schreyer Institute for Teaching Excellence transformation from a center that struggled to find meaning in its data, to one that used data to effectively communicate its achievements. Our new approach focused on reporting data that were relevant for current priorities framed as future-oriented strategic goals.

We arrived at our new plan by adapting Peter Drucker's Five Most Important Questions (Drucker, 1993). Drucker's framework has been influential since the 1970s and more recently has been adopted and adapted by governmental entities and non-profit organizations as they develop their strategic plans (Drucker et al., 2008). We combine his five questions with the four-step process described in the previous section and use it to structure the remainder of this paper (Figure 3).

What is our Vision?

The Schreyer Institute's vision is for all Penn State students to be engaged in and responsible for their own learning by means of excellent teaching. Our new vision served an important purpose of uniting center staff and faculty around our shared aspirations and a common identity. This step was critical to the center's future because the center had grown due to a merger of four separate units—each with its own history, identity, and mission. For a number of years after the merger, those offices essentially continued to operate independently in a new shared location, which created competition, redundancies, and inefficiencies in allocation and time and resources.

A small committee with representatives from each previous unit worked together, using the definitions above, to create an aspirational vision that showed our commitment to the university and its students. The early vision (Figure 2) was time-limited and focused on the center's reputation. Center personnel could not remember the vision, and found it neither inspirational nor aspirational.

The revised vision reflects a shared identity and focuses on the idealized future of the teaching and learning environment at Penn State. The vision is consistent with the definition above and describes what our university would be like if the Schreyer Institute was 100% successful in achieving its mission and was no longer needed. Stating the vision this way does not put the center at risk. Our vision is essentially unattainable because new students, faculty, and administrators join the university every year and each is at a different stage of development.

What is our Mission?

The Schreyer Institute's mission is to advance and inspire excellence in Penn State's teaching and learning community. This is a substantial change from a mission that described our location within the university's organizational structure and a variety of topics addressed by the center. Our early mission did not explain our purpose, nor did it help us decide where to put our time, effort, and resources. Our early mission hinted at our purpose, but in so many words that no one in the center could remember it. Our revised mission is brief, memorable, and focused on why we exist and refers to our core work.

The verbs in our mission were carefully selected to make clear that our center is not responsible for improving faculty teaching or student learning. This was an important point because those are not under the center's control. The center's purpose is to aid our instructional clientele as they develop themselves and ensures that our constituents will not mistakenly assume that we will 'tell them how to teach' and that we are committed to faculty autonomy and academic freedom.

One of the most important steps we took in defining our mission was to separate out who we serve, and what, how, and when we work with our constituents and stakeholders (Figure 2, right column). We make it easier for our clients to teach well and to make decisions that enable students' learning by providing relevant, timely, helpful, high quality, and context-specific resources, services, and programs.

Figure 3. Strategic plan elements (vision, mission, goals) combined with organizational management questions from Drucker (1993; Drucker et al., 2008). We have reordered and rephrased these for use by CTLs.

1. What is your **Vision**?

What would your institution be like if your unit were no longer needed? How would you describe your institution if your unit achieved its mission? What would faculty and students be doing if your center were successful?

2. What is your **Mission**?

Why does your center exist? Why was it created? What work is it supposed to do? What guides decisions about where you put your time, effort? How do you spend your funds?

3. Who are your **Constituents** and what do they **value**?

Who benefits from your success? Is your center assessment aimed at all or only one of your stakeholders, such as the administrator to whom the center reports?

Does your assessment present evidence important to your clients and your stakeholders? What kind of evidence do they value? Is your evidence useful to your constituents? Do your reports provide information in a formats your constituents value?

4. What are **Goals** for the future?

Are they linked to your Mission? Are they future-oriented? Are they Specific, Measurable, Achievable, Relevant, and Timely? Are they improvement-based? Do you specify what will change and by how much?

5. What is your **Plan**?
    a. Does the distribution of CTL effort, time, and resources to align with current priorities? What does your center need to do better? What should it stop doing? What could be changed to target new or emerging priorities?
    b. What are your results? Do the results document your achievements? Do they demonstrate your effectiveness? Do they help you make decisions about how you spend your time and resources?

Note: Drucker's "five most important questions" are: What is your mission? Who are your constituents? What do they value? What are your results? What is your plan?

Who Are Our Constituents and What Do They Value?

This question was the most significant of the planning process because it prompted significant reflection and discussion. Analysis of the needs and expectations our clientele and stakeholders led to new goals, as well as alterations to our services and internal processes.

Our constituents are any member of Penn State's teaching and learning community involved with students in any instructional mode or context. This community includes all instructors of any rank, title, or position teaching for any of our campuses (Figure 4). Providing additional details aside from our mission is important for individuals who might be unsure about whether we consider them among our clients, e.g., part-time faculty.

No one will be surprised that faculty, graduate students, and our executive administrator were first on our list of constituents and stakeholders, but we also named postdocs, administrators, our advisory board, and staff. For example, explicitly including administrators aligned programming for graduate coordinators, postdocs, and department heads. Another benefit of clarifying who we serve is that it also allowed us clarify who we do not serve. For example, we do not generally work with people who teach individuals not enrolled as students with Penn State.

As our center transitioned to using our strategic plan as a guide to center assessment, we engaged in conversations about what information would be of interest to the different constituencies we identified during this step. We also began to explore what kinds of evidence different groups would find valuable or useful. As we identified additional constituencies, we developed a Constituents Matrix (Table 1) in recognition that each may value different types and formats of evidence. As we filled in the first and second columns of the matrix, we recognized ourselves as stakeholders and added the third column to the matrix to capture what we wanted our constituents to know about us.

Completing the matrix helped identify gaps in our knowledge, which presented us with our next task—investigating what our constituents want to know. We accomplished this by personally contacting members of each constituency. For example, we contacted a sample of long-term clients to ask them "Why should your colleagues work with the center?" While some of what we gathered was familiar, we had never asked our clients to tell us in their own words why they worked with us. We gained valuable documentation (evidence) of what our constituents valued and we learned that constituent voices were persuasive among their peers.

This process also helped us appreciate the value of including qualitative data in our center assessment and made clear that community-building and networking were important services. These and other responses gave us a new language to describe what we do and how the center can help constituents achieve what is important to them.

What are our Strategic Goals for the future?

The strategic planning process prompted us to ask whether our center was doing what it should be doing given its mission and vision. Was our center being responsive to our constituents? How did we know? As a result, we identified three primary goals for our seven-year strategic planning period (see bottom of Figure 4) that reflect restructuring to eliminate remnants of the four previously merged remnants and formal creation of a TA and Graduate Instructor program. We

Table 1. Constituents matrix. What this table shows is the product of our exploration into who our constituents are and what they want to know. For our CTL, one key takeaway was that each group of constituents has its own set of questions about how we can help. We also realized that what we want each constituency to know might differ from what they want to know, in part, because they may know what we do. This matrix may be helpful for other CTLs engage in a similar process of discovery.

Constituents	**What do our constituents want to know?**	**What do we want our constituents to know?**
Faculty	• Whether working with us will improve their teaching • Whether we can help them interpret and respond to student ratings • Whether working with us will help them do what they value (e.g., save time, improve learning, learn new strategies)	• We work with top faculty! • We have disciplinary expertise, as well as teaching expertise
TAs/Graduate students	• Whether we work with other graduate students • Reduce stress about teaching • Can working with us improve job search competitiveness • How to write a teaching philosophy • Help navigating between being a student and teaching students	• Principles that guide our practice • Topics other graduate students have found helpful
Department Chairs and Program Heads	• Their faculty already work with us • Their faculty find working find working with our faculty helpful • We understand their discipline values and culture • What we do and how that will help faculty • How effectively we work with faculty facing teaching challenges • Whether we take referrals	• Principles that guide our practice • Process of working with us
Associate Deans & Directors of Academic Affairs	• Whether they can refer faculty to us. • Whether their faculty have worked with us and found it useful.	• How to frame referrals as a benefit, not a punishment • Principles that guide our practice • Process of working with us

Constituents	What do our constituents want to know?	What do we want our constituents to know?
College Deans & Campus Chancellors	• Which college/campus cares the most about teaching • Which college/campus ensures their faculty are successful meeting teaching quality expectations I the promotion process • Who has received the most grants from us	• Whether their college or campuses work with us • Which colleges work with us the most (and that this is a good thing)
Vice President & Dean of Undergraduate Education	• Numbers of workshops of and consultations • Who we work with all colleges and campuses	• We collaborate with other units in Undergraduate Education • We work with faculty from all over the university • We serve on university committees • We publish

Figure 4. Our vision, mission, and goals after following a multi-step strategic planning process.

VISION

The Schreyer Institute for Teaching Excellence vision is for all Penn State students to be engaged in and responsible for their own learning by means of excellent teaching.

MISSION

The Institute's mission is to advance and inspire excellence in Penn State's teaching and learning community.

***Who** works with us?*

We define the teaching and learning community broadly to include any person involved with Penn State students in any instructional mode or context at any campus.

We primarily work with instructors (of any rank, title, or position type) and graduate students, but we count administrators, advisors, and staff among our constituencies. We also work future members of the Penn State teaching and learning community.

***What** does the Schreyer Institute do to achieve its mission?*

We help students learn by making it easier for instructors to:

- Use effective teaching methods in face-to-face, online, remote, or mixed mode courses
- Engage all students in inclusive and equitable learning environments
- Effectively assess students' learning
- Enhance the value of teaching excellence
- inform decision-making about teaching and learning

***How** does the Schreyer Institute achieve its mission?*

We collaborate with the teaching and learning community through:

Consultations	Grants
Course observations	Research & publications
Workshops & Presentations	Teaching communities
Conferences	Resource development & curation
Collaborations	Student ratings
Testing and Scanning Services	Committee service

GOALS

1) *Visibility*. Increase the Institute's visibility as one of the primary sources of information and help with teaching and learning innovations and challenges.
2) *Impact*. Increase knowledge and use of the center's teaching and learning resources (human, electronic, fiscal) in ways expected to impact teaching and/or learning.
3) *Quality*. Deliver high quality information, services, and materials using efficient and effective processes.

prioritized our first goal over the other two, so that received much of our attention in the early years of the plan.

The first goal of increasing visibility for the center reflects a variety of issues including university complexity and name recognition. Our university has multiple campuses and many of our clients were not aware we also served them, as well as the campus where our office is located. Our center was also regularly confused with another unit that shared part of our name including the Schreyer Honors College. We will discuss this goal in greater detail in the next section.

The second goal of increasing our impact was in response to the relatively few clients we worked with given the scope of our responsibilities. While we needed to make progress on our first goal to realize our second, early changes included setting consultant productivity goals and modification of our grant programs to reach more faculty and students. Changes included eliminating two grant programs that were expensive but impacted few faculty and no students. Our third goal focused on the quality of our services. For example, rather than each focusing on one specialty, our consultants determined that each should be able to respond to basic requests and doing so required professional development. Our graduate students also needed training in educational development. Center staff managed a number of university-level services that needed to be updated including student ratings and testing and scanning services. Our communications plan needed to be updated as well.

Goal 1: Increasing the Visibility of Our Center

In the remainder of this article, we provide details about how we enacted just one of our three goals (Figure 2, right column). The full center assessment included details for each goal, but space limitations prevent us from sharing those and the results for each goal; the process was identical for each goal. We chose to share the details for Goal 1 because many CTLs are challenged to reach significant percentages of potential clients. We also chose it because some readers might think it is a superficial goal, when in fact, achievement of the other goals depended on it and because it led to many changes that are now embedded in our practices and processes. Our center continues to reap benefits years later.

The Schreyer Institute for Teaching Excellence would not have achieved greater visibility within two years had we not identified visibility as a separate strategic goal with specific targets and actions that would demonstrate when the goal had been achieved. To demonstrate the power of strategic goals and actions, we provide details about how we met this goal. Many of these actions evolved into standard operating procedures, which we use to maintain our visibility, even while our priorities shifted to other strategic goals.

Increased visibility of our center was key because Penn State is very large and distributed across 24 campuses. Our center faced a daunting visibility challenge because our clientele includes more than 6000 faculty grouped into about 200 academic units with instructional responsibilities. If our constituents were not aware of our center, they could not work with our instructional consultants, request services and programs, or use our resources. Improving our visibility would ensure that our efforts to meet our Impact and Quality goals would have an effect and would ensure that we were stewards of university resources.

Unit Liaisons. One of our first visibility actions was to connect each academic unit with a specific instructional consultant to serve as the unit's liaison. The liaison role ensures that any administrator, faculty, graduate students knew whom to contact in the Schreyer Institute. Serving as liaisons led to our consultants learning about disciplinary cultures and the specific concerns of instructors in those units. Our center is also physically located on the most central and largest campus, which led some of our clientele to believe we only served that campus. Because the liaison role involves regular communications with academic unit leaders and offers to visit the campuses, we have overcome that misperception. We still have unit liaisons today (https://www.schreyerinstitute.psu.edu/help/liaisons).

Distributed Responsibility for Visibility. Part of the challenge of increasing visibility was the increased effort needed to create and maintaining relationships with a variety of academic and administrative units. One important change we made was to distribute university level committee service across the instructional consultants and other center staff. Distribution of committee memberships among the staff and instructional consultants increased recognition that center personnel were not only valuable resources for the entire university, they had a wide variety of expertise. Prior to the redistribution, most of the committee work fell to the Schreyer Institute director, which included up to 20 committees; redistribution halved that load. By the time we met our visibility goal our center's total committee involvement had quadrupled. While the staff committee work has remained stable, the instructional consultants' expertise has been widely recognized and they now chair or serve on a wide variety of university committees and internal advisory boards.

Brief SITE Information Sessions. Another activity designed to increase our visibility was to visit departments and campuses to talk about our available programs, resources, and services. Our consultants collaborated to develop brief (10 minute) center "info sessions" to deliver at regularly scheduled faculty meetings (Figure 5). Visits represented an important shift away from a culture of "come to us" to one where we seek out events or places where they already congregate. These Information Sessions evolved to include key items such as a checklist of common consultation and workshop topics and showing participants how to navigate and access our web resource repository.

In our initial year, our goal was to *offer* to visit 100% of the academic departments (we knew not all would accept) at the largest campus and 50% of the other campuses. In the subsequent year, our goal evolved to *attend* 50% of departmental faculty meetings at the largest campus and conduct instructional programs for 50% of the other campuses. We met the goal of attending 50% of departmental faculty meetings and exceeded our campus target by 23%, conducting programming for 73% of the campuses.

Visibility with Administrators. Completion of our Constituents Matrix earlier in the strategic planning process (Table 1) prompted us to develop new ways raise our visibility with college and campus administrators that could increase interactions with our center. Rather than present raw data about our services, we created a new "interaction" variable and presented it proportionally relative to the distribution of faculty across the university (Figure 6) based on the expectation that our interactions with clients would be roughly proportional to faculty across the colleges and campuses. And if not, the differences should be explainable, for example if they had a local

Figure 5. Histogram of CTL Information Sessions between over 11 years. These information sessions were developed to help us meet our increased visibility goal in Year 4. That goal was met and retired in Year 6. Prior to Year 4, such sessions were requested infrequently. While the center still offers these sessions, but these are more often prompted by academic administrators who want their faculty to know more about resources of our center

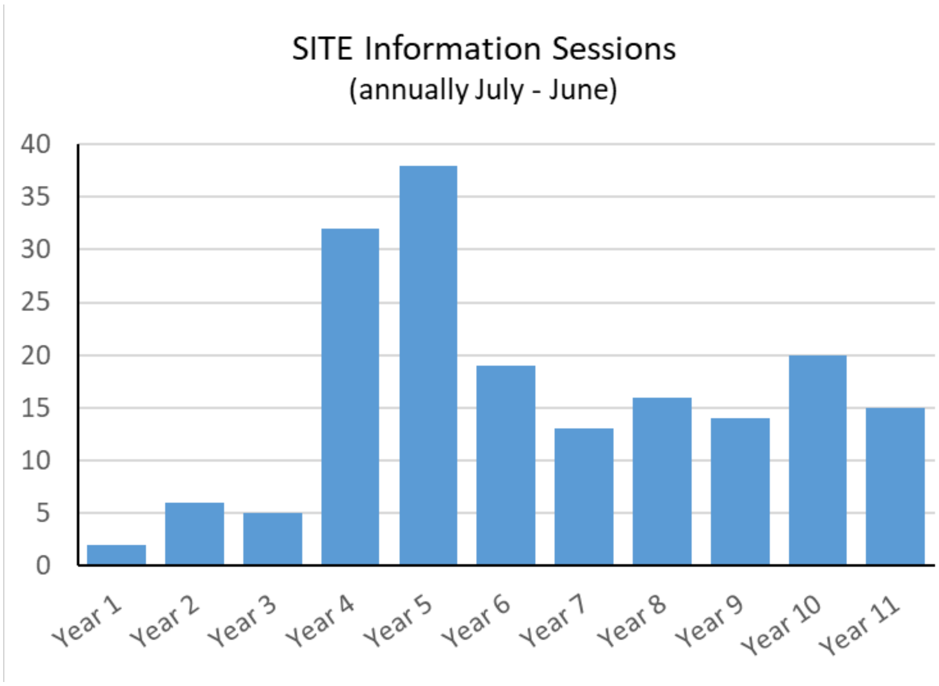
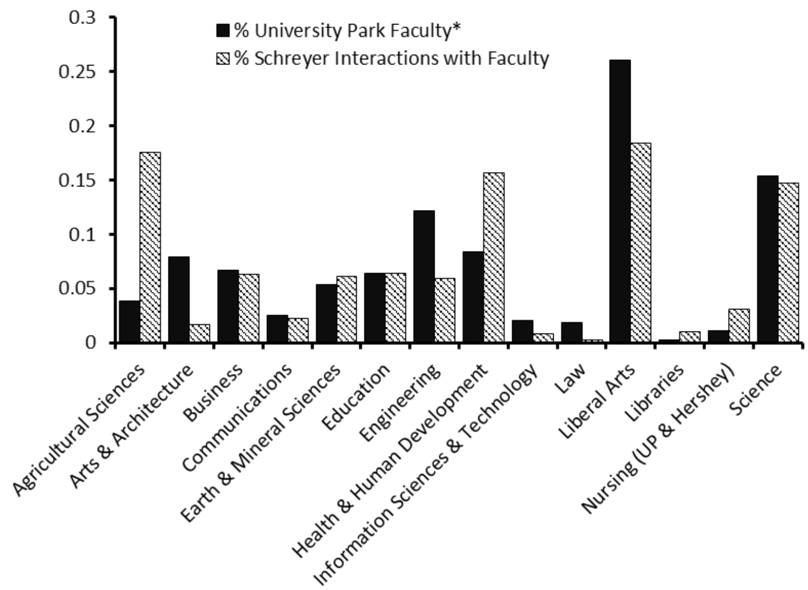
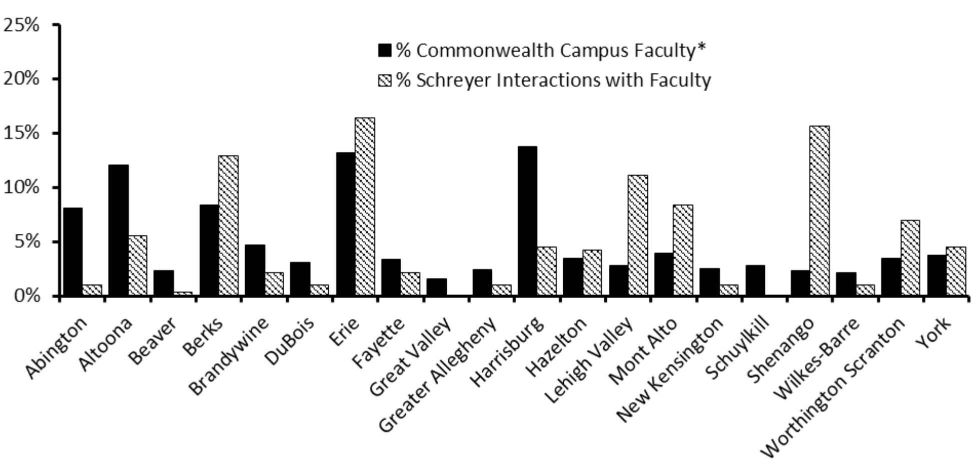


Figure 6. College and campus faculty distributions relative to center interactions. Proportional interactions with the Schreyer Institute by college and campus for a single year. When college or campus percentages (black) are higher than Schreyer Institute percentages (gray), interaction rates with the center are lower than expected given the distribution of faculty. Exceptions include units with strong local support for teaching (e.g., College of Engineering, and Altoona, Erie, and Harrisburg campuses). Units with percentages equal to or higher than expected may indicate a strong emphasis on teaching excellence (e.g., colleges of Agricultural Sciences and Health and Human Development, and Berks, Erie, Lehigh Valley and Mont Alto campuses) or CTL co-sponsorship of unit teaching events (e.g., Shenango and Worthington Scranton campuses).





* College and campus percentages are calculated using Academic FTEs and include tenure-line, full-time teaching faculty, part-time faculty, and graduate assistants.

teaching center or the unit lacked resources. No Dean or Chancellor wants to be the college or campus with disproportionately low interactions with the center.

This format served presented us with an opportunity to have a conversation with specific leaders about why their interactions with us were lower than expected. For example, we opened a conversation with the College of Arts & Architecture about why the college interacted with us less than we expected, especially given that the college was known to value teaching excellence. We learned that we needed to do more to engage the college and communicate to their faculty about our customized services and programming, i.e., we do not provide generic programming. As a result, we hosted a visiting speaker identified by the college, to jumpstart conversations about General Education and the Arts and made sure that the college was represented in university-wide initiatives. Our interactions with this college more than tripled within 3 years.

Another important outcome of our constituent analysis was recognition that our visibility among smaller units such as programs, departments, schools, and divisions tended to decrease over time due to leadership changes. In order to maintain a high level of visibility, we needed an efficient and effective way to communicate regularly with these administrators about what we could do for them, as well as why they might want to encourage their faculty to work with us. We reached out to a sample of administrators who have daily responsibility faculty teaching and student learning, and who was familiar with the center's benefits, to ask them "What would your peers want or need to know in order to encourage their faculty to work with the center?"

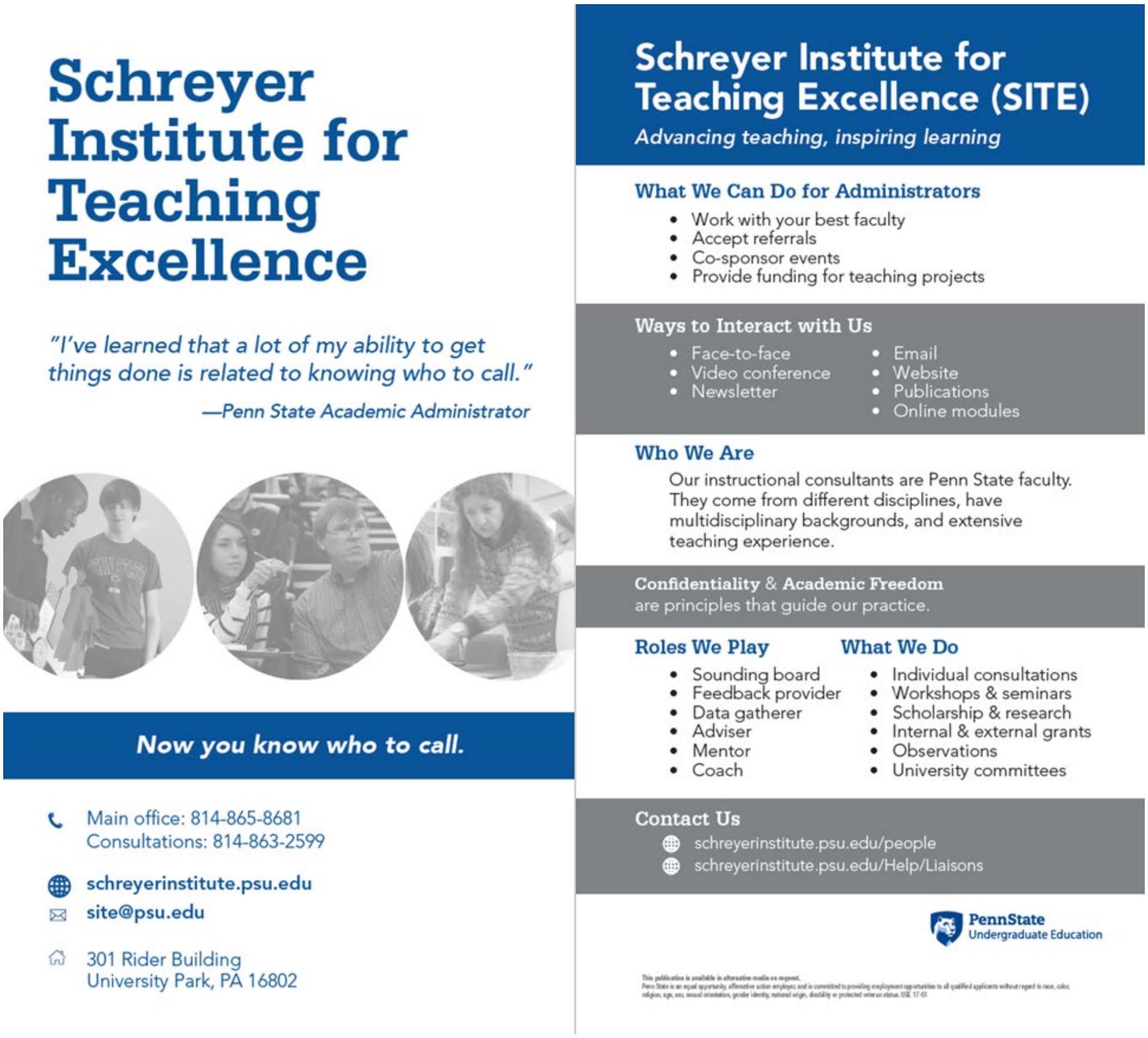
The information they valued and thought other administrators would want to know were remarkably similar, despite that they were from units with different disciplinary cultures, teaching methods, and enrollments. We now provide our administrator "calling cards" annually (Figure 7). To our knowledge, no other CTL had developed a marketing piece specifically for administrators. Some of our consultants have received feedback from unit heads that the cards are useful because what the center does is listed in a short, easy-to-absorb format, both of which are important for busy administrators.

The interviews also prompted other actions by our center:

- Meet face-to-face with every newly appointed campus and college leaders.
- Request to participate in a campus or college leadership meeting.
- Provide "scripts" for administrators to use when referring faculty to us to ensure that the center is a presented as a resource, not a punishment.
- Provide center flyers to search committee chairs so that the center could be included in recruitment materials or noted during interviews.

Collaborations. We also set a goal to increase our visibility by proactively pursuing collaborations with other administrative units. We exceeded our modest goal of five collaborations in the first year and doubled that over the next six months. Examples of these collaborations include workshops on copyright and new media with the university libraries, online teaching with the with our distance learning unit, ebooks and clickers with our educational technology unit, academic integrity with the student conduct office and global engagement and difficult dialogs with the equity and inclusion unit.

Figure 7. The two-sided flyer we developed for administrators came from interviews with a sample of college associate deans and campus academic administrators. The flyer information reflects what these administrators suggested their peers would want to know about the center.



Publicity and Marketing. Our CTL's visibility campaign also resulted in significant changes to the internal processes of center staff. We set a goal to identify and utilize all available avenues to announce 100% of our events. Specific staff members were assigned the responsibility for cultivate contacts in the university communications office to ensure that our events were submitted for inclusion in the university newsletter.

Other changes included:

- Redesign of four websites (Schreyer Institute, program assessment, student ratings, and testing center) to publicize our services, programs and grants, and draw clients to the websites.
- Creation and use of social media to reach faculty and TAs with announcements and original content.
- Revitalizing our center's newsletter, including a commitment to publish it monthly and make it easier for individuals to sign up to receive it.
- Asking participants in every event whether they wanted to be notified of future events.
- Partnering with the faculty senate to implement faculty disciplinary communities across all campuses.
- Distribution of CTL informational and promotional materials at all center and co-sponsored events.

Visibility to Executive Administrator. We also made changes in how center data were presented to our administrator. These changes were important because we are a relatively low visibility unit within the Office of the VP and Dean for Undergraduate Education, which in addition to our CTL, includes 16 other units, most of which primarily serve students.

Our administrator always took an interest in the varied expertise and specialties of our consultants in addition to the center's work as a whole. The composite interaction variable, noted above, takes into account the variability in responsibilities of each consultant, and also reflects that administrator's preference for quantitative data.

Tables 2 and 3 present similar data, but in different ways. Table 2 represents consultant productivity in a way that highlights that reflects differing responsibilities of individual consultants, as well as the overall productivity for the center.

Neither table captured the myriad other responsibilities of our center's educational developers, including supervising graduate or undergraduate students, liaising with administrative units (online learning, educational technology, student support, general education), teaching, research, and involvement with university level initiatives. We now document involvement in internal and external collaborations, committees, initiatives, and working groups individually in consultant dossiers (CVs) as well as in aggregate for the center.

Increased Visibility Goal: Summary. All of these efforts had a cumulative impact. As a result of our center's intensive effort to be more visible to our constituencies, we achieved our visibility goal. This achievement is exemplified by a leveling off in our information sessions after we met this goal (Figure 5). We experienced substantial increases in requests for consultations and

Table 2. Annual productivity by consultant: each row is a different individual except the last†. The final column is a composite variable that reflects the number of clients in the entire portfolio of each consultant's work: consultations, center-sponsored workshops, invited workshops, and presentations. When consultants co-facilitate, the interactions are counted for each consultant in recognition that each contributes effort and time.

% FTE†	Consultations	Consultation Participants‡	Workshops	Workshop Participants	Total Interactions
1.00	114	127	62	744	1030
1.00	84	94	23	608	782
1.00	92	102	19	717	914
1.00	141	183	31	318	611
0.25	69	89	19	647	789
1.00	75	88	33	545	697
1.00	84	85	12	221	354
1.00	151	188	27	757	1067
0.75	9	9	45	756	780

† Percent of year in position or percent of time spent on consulting and workshops; the final row represents two graduate student consultants.

‡ Some consultations include multiple people.

Table 3. Annual overall center productivity presents the combined work of all consultants. The column totals in this table would not equal the column totals from Table 2, were they summed, because clients are counted only once at the center level.

	Total	**Mean/ FTE**
Total Consultations	819	102
Total Consultation Clients	965	121
Total Workshops	225	28
Total Workshop Attendees	4153	519
Total Interactions	5118	640

customized workshops, as well as an increase in visits to our websites. Our efforts to increase our visibility led us to set a new goal for our interactions with our constituents. While many centers expect to reach only about 15-25% of their constituents (ACE & POD Network, 2018) we initially set a stretch goal of interacting with 30% of our university's full-time faculty and administrators, which we exceeded by 10%.

For readers who might see some of the above examples as a simple reframing of participant counts, we wish to point out some important differences. First, the counts reflect key changes that we made to the work of our center in response to our revised mission. Second, the counts were no longer general—they had meaning because they served as evidence of successfully meeting our goal to increase our center's visibility with our constituents. The important difference is that when we use counts, they are no longer presented out of context, but rather relative to a particular goal. It was the act of setting this goal led us to identify relevant data that could demonstrate achievement. Finally, we remind readers that not all changes associated with our visibility goal involved counting participants (e.g., administrator calling card, website redesign, and social media).

We continue to use this approach for holistic center assessment, even as we evolved and met our targets under each goal. Our vision and mission have not changed, but our goals have changed to reflect new priorities.

Summary

The educational development community is concerned about overall assessment of centers for teaching and learning, as well as assessment of the individual programs they offer. Approaches and practices for the latter are well-developed and widely used to provide valuable information about the quality of and response to past programs (Hines 2009, 2011). Members of the community continue to seek center assessment approaches that are adaptable to a wide variety of institutional contexts and types (Bamber & Anderson, 2012; Bamber & Stefani, 2016; Brew, 2007; Chalmers & Gardiner, 2015; Collins Brown et al., 2016; Sutherland & Hall, 2018), and the need is largely unmet.

Many educational developers consider impact on faculty teaching and improvement of students' learning to be the ultimate goal of center assessments. Yet relatively few centers have the personnel, time, or research expertise to dedicate to establishing causal links at their own institutions (Wright et al., 2018). The pressure for every center to establish these links and impacts locally might ease as the body of research demonstrating that educational development leads to more effective teaching and improved learning continues to grow (e.g., Condon et al., 2016; Connolly et al., 2016; Denecke et al., 2017; Finelli et al., 2008; Gibbs, 2013; Gibbs & Coffey, 2004). Decreased pressure for each CTL to conduct its own confirmatory research will allow center personnel to focus attention on assessing whether a center is meeting its mission (its purpose and reason for being) in line with the values and priorities of the home institution. We submit that center strategic plans are an efficient, flexible, and effective framework to guide holistic center assessment.

Given that most CTLs are expected to develop a strategic plan, why is this approach not already more common? One barrier to using strategic plans for overall center assessment is lack of consistency in the strategic planning process within higher education, including how key elements of strategic plans are defined and used. Vision and Mission are often conflated or combined. One reason for the confusion may derive from the order in which they are created in real-time. In strategic plan documents, the vision is usually listed first, because it is framed at a grand scale and is essentially a prediction of the future. However, in order to create a vision statement for an organization, the organization must first exist. That is, in order for an organization to come into existence, it must have a purpose—it must have a mission. Without a mission, the organization cannot envision a future in which the organization is no longer needed (its vision). We suggest that units begin with their mission, proceed to a vision, and only then discuss steps the unit can take to achieve the mission.

We agree that participation and satisfaction data are necessary because they reflect what CTLs do, how they do it, and for whom. However, in our experience, these data *alone* do not make a strong case that a CTL is achieving its purpose, i.e., meeting its mission. Rather we suggest that center assessment should include data that reflect the unique needs of the institution, its faculty, and its students, which determine its strategic goals. CTLs exist at many types of institutions that employ instructors with disparate responsibilities who teach divergent student populations with unequal educational needs and aims. CTLs also vary in size, funding, clientele, and responsibilities. Given this extensive contextual variability, what each CTL is trying to achieve in any one year or planning period should vary. We suggest that the strategic plan is the document that best captures that variability.

Strategic plans are useful for center assessment because they take into account center context and institutional priorities. Since most CTLs already devote considerable time and energy to develop a strategic plan, it might as well be used for its intended purpose, which is to provide direction for an organization and guide future decisions. Strategic goal setting and intentional evidence reporting alleviates pressure to assess every goal every year and interrupts the tendency to count and document everything, whether or not those data are meaningful. Centers that report information directly connected to their purpose and future aims will be in a better position to articulate their value to constituents and institutional leaders.

In order to help other centers for teaching and learning consider this approach, we defined the essential elements of strategic plans (including clear differentiation of vision from mission), described the strategic planning process, and provided planning process aids. We then provided examples of how we used our strategic plan to implement and assess just one of our goals—increased visibility. Holistic center assessment includes evaluation of progress toward achieving each goal identified in a strategic plan.

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