2022 PTIE Conference Abstract

Title: PTIE: Reflections on University Strategic Planning & Holistic Faculty Evaluation
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Abstract:

On the basis of our long-standing involvement and experience with promotion and tenure at the university level, in this presentation we examine the importance of university strategic planning and holistic faculty evaluation in realization and implementation of promotion and tenure innovation and entrepreneurship (PTIE) recommendations. After developing a reflection protocol, we engaged with self-introspection on our efforts and progress on PTIE on our campus. Our reflections suggest that innovation and entrepreneurship (I&E) are constrained in absence of holistic faculty review. Similarly, university wide commitment to I&E as reflected within the strategic plan must be followed by concrete actions to implement. To this end and based on our lived experiences, we present a few practical suggestions and recommendations for higher education institutions.

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Abstract

Based on long-standing involvement and experience with promotion and tenure at the university level, in this paper, we examine the importance of university strategic planning and holistic faculty evaluation in realization and implementation of the promotion and tenure - innovation and entrepreneurship (PTIE) recommendations. After developing a reflection protocol, we engaged with self-introspection on efforts within the past decade at our university and the resulting progress with PTIE on our campus. Our reflections suggest that proper consideration of innovation and entrepreneurship (I&E) activities as part of the promotion and tenure review process are constrained in the absence of a holistic faculty review. Similarly, a university-wide commitment to I&E, as reflected within the university strategic plan, must be followed by a concrete implementation action plan. To this end, and based on lived experiences, we present a few practical suggestions and recommendations for higher education institutions.

Introduction

Throughout efforts to implement the recommendations of the Promotion and Tenure – Innovation and Entrepreneurship (PTIE) coalition of higher education institutions (Carter et al., 2021; Bouwma-Gearhart et al, 2021), we very soon realized that both the implementation of university strategic planning and holistic faculty evaluation play decisive roles in achieving the PTIE goals. Our university is an AAU, R1, land-, sea-, and space-grant institution with a large student and faculty body, and we have been actively involved in the PTIE coalition. The Texas A&M University System was one of the first academic institutions to include patents or commercialization of research, where applicable, in the guidelines for evaluation of faculty for promotion and tenure (P&T from here forward) in 2006 (Sanberg et al., 2014; Stevens, et al., 2011). To this end, we decided to reflect upon our understanding of and efforts with university strategic planning and holistic faculty evaluation in the context of PTIE recommendations (Figure 1) to provide insights and recommendations for improving faculty evaluation. The following two research questions were crafted to guide this paper:

- RQ1: What are issues and implications with regards to university strategic planning and holistic faculty evaluation in the context of PTIE recommendations?

- RQ2: What are recommendations for university strategic planning and holistic faculty evaluation with regards to PTIE goals?

The aim of this study is therefore to develop understanding, generate knowledge, and offer suggestions for faculty and administrators involved in faculty review, promotion, and tenure (RPT) in their efforts towards the implementation of PTIE recommendations (Figure 1). To provide background, here we briefly define university strategic planning and holistic faculty evaluation as key terms in this paper.

PTIE Recommendations

1 Overarching language that links a university's stated mission, values and goals to the criteria for P&T evaluation

2 Explicit description of a diverse list of metrics with examples for evaluation that can be integrated into existing university criteria

3 Sample text for capturing evidence of innovation and entrepreneurial (I&E) related impact within the commonly used research, teaching and service categories

4 Recommendations for process changes to ensure recognition of faculty engagement in I&E, acceptance of metric criteria and an unbiased evaluation of each case to help create culture change

Figure 1. PTIE Recommendations based on Carter et al. (2021)

University strategic planning

University strategic planning is the process of defining the mission, values, institutional goals, vision, objectives, and implementation strategies that guide the university to prioritize resources and promote organizational focus (Hinton, 2012). University strategic plans therefore set the standards for RPT through highlighting institutional goals and values.

Holistic faculty evaluation

The roots of holistic evaluation may be traced back to holistic perspective in qualitative evaluation as a core strategy of inquiry (Patton, 2015). Holistic perspective perceives a

system as "a whole that is both greater and different from its parts" (Patton, 2015, p. 140). Therefore, the phenomenon under evaluation is considered as a complex system and the evaluation "focuses on and captures complex interdependencies and system dynamics that cannot meaningfully be reduced to a few discrete variables and linear, cause effect relationships" (Patton, 2015; p. 47). The following excerpts from Patton (2015) illuminate the underlying logic of holistic evaluation in contrast with quantitative/experimental evaluation:

> "The essential logic [of quantitative/experimental approach in evaluation] is as follows: (a) key program outcomes and processes can be represented by separate independent variables, (b) these variables can be quantified, and (c) the relationships among these variables are best portrayed statistically. The primary critique of this logic by qualitative/naturalistic evaluators is that such an approach (a) oversimplifies the complexities of real-world programs and participants' experiences, (b) misses major factors of importance that are not easily quantified, and (c) fails to portray a sense of the program and its impacts as a "whole". To support holistic analysis, the qualitative inquirer gathers data on multiple aspects of the setting under study to assemble a comprehensive and complete picture of the social dynamic of the particular situation or program". This means that, at the time of data collection, each case, event, or setting under study, though treated as a unique entity, with its own particular meaning and its own constellation of relationships emerging from and related to the context within which it occurs, is also thought of a window into the whole. Thus, capturing and documenting history, interconnectedness, and system relationships is part of fieldwork." (p. 67)

Figure 2 demonstrates the differences between quantitative and qualitative approaches in evaluation. Holistic evaluation struggles with its own challenges. According to Patton (2015):

> "The ongoing challenge of qualitative analysis is moving between the phenomenon of interest and our abstractions of that phenomenon, between the descriptions of what has occurred and our interpretations of those descriptions, between the complexity of reality and our simplifications of those complexities, between the circularities and interdependencies of human activity and our need for linear, ordered statements of cause and effect." (p. 602)

Taking these into consideration, holistic evaluation of faculty recognizes the intermingled nature of teaching, scholarship, service, and professional development, and emphasizes the growth of faculty as a key indicator of development (Gillman et al., 2018). Therefore, holistic faculty evaluation "proposes that faculty members should be treated as members of a team, each bringing particular talents to the department's collective work. These talents are then combined and re-combined in transparent ways

that advance the mission of the department in alignment with the institution's goals. The model further suggests that these talents need to be developed, learned, and shared over the course of a faculty member's career" (Gillman et al., 2018, p. 8).
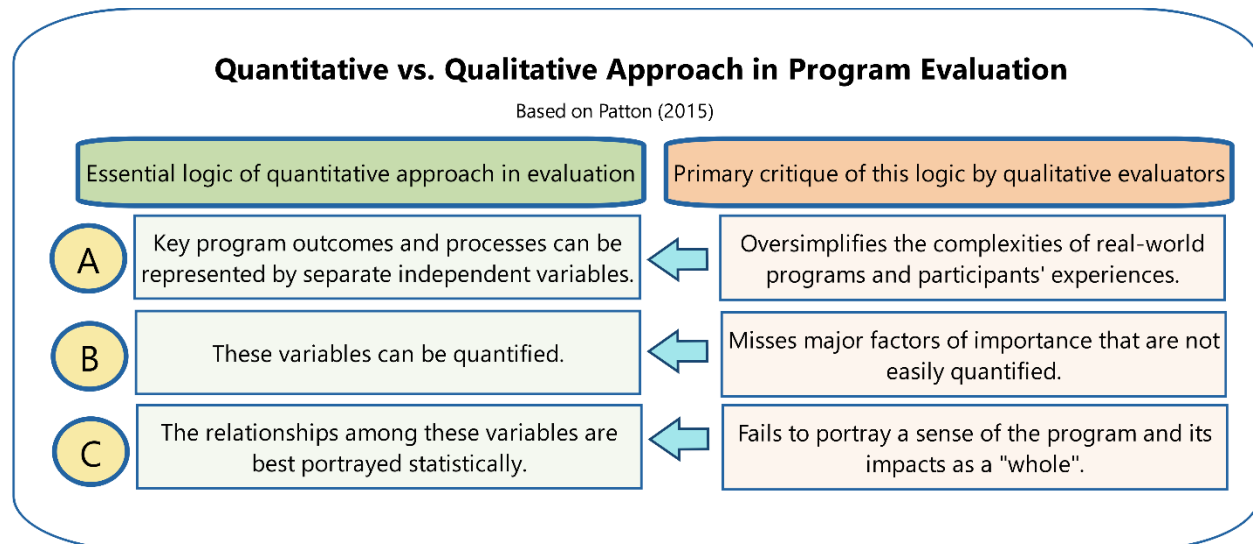
Quantitative vs. Qualitative Approach in Program Evaluation

Based on Patton (2015)

Essential logic of quantitative approach in evaluation	Primary critique of this logic by qualitative evaluators
A — Key program outcomes and processes can be represented by separate independent variables.	⬅ Oversimplifies the complexities of real-world programs and participants' experiences.
B — These variables can be quantified.	⬅ Misses major factors of importance that are not easily quantified.
C — The relationships among these variables are best portrayed statistically.	⬅ Fails to portray a sense of the program and its impacts as a "whole".

Figure 2. Quantitative vs. qualitative evaluation based on Patton (2015)

Theoretical Framework

This qualitative inquiry is epistemologically situated within a constructivism paradigm which is concerned with adding in-depth knowledge to our previous understanding of a phenomenon (Glesne, 2016). Reflexivity was chosen as our method of inquiry where participants engage with self-critical sympathetic introspection and the self-conscious analytical scrutiny of the self as researcher (Patton, 2015). Specifically, reflecting on the steps taken to continuously improve the P&T process, especially to expand the assessment and appreciation of faculty impact via innovation and entrepreneurship (I&E), provides for insights from those leading faculty affairs and faculty development functions. This is an appropriate method for this study because we aimed at encouraging self-discovery to gain insights about the research questions to contribute to the PTIE conference. Within this conceptual framework, the qualitative researcher is reflective about their voice and actions as the instrument of inquiry to be able to portray the world authentically in all its complexity (Patton, 2015).

To this end, the second and third authors of this paper reflected upon university strategic planning and holistic faculty evaluation. The participants in this reflective study (a) were involved in the PTIE coalition and (b) served in various roles at the department, college, and university level administration and faculty development for more than a decade, making them information rich case studies for this qualitative inquiry, and therefore, they are worthy of in-depth study (Patton, 2015).

Methodology

Reflections are considered rich qualitative data that offer deeply valuable information about personal experiences and engagements. We decided to adopt a reflection framework because it allows participants to go through a systematic investigation into and unpacking of their experiences using guiding questions in a structured reflection process. Another reason for using a reflection framework is that it allows structuring the qualitative analysis of data and therefore makes it easier for both researchers and audience to gain insights into the findings (Glesne, 2016; Patton, 2015).

After searching among different reflection frameworks, we chose the What? So what? Now what? Framework (Borton, 1970; Driscoll, 1994; Rolfe et al., 2001) to inform our reflection questions. This framework is simple, critical, and interdisciplinary and aligns well with our research questions. We then developed a reflection protocol (Appendix 1) that was followed by the participants for their introspections.

The reflections were then organized, analyzed, and visualized using MAXQDA Pro 2020 software. Following the reflection protocol questions, the responses were first organized based on the RQs. Major themes in responses were then identified, highlighted, and analyzed by the first author of the paper. Finally, visualizations were created using MAXmaps, a visual tool in MAXQDA. Member checking strategy was used throughout the research to enhance the trustworthiness of findings (Patton, 2015).

The two reflections contained roughly 4000 words combined. Figure 3 is a word cloud representing the highly frequent words that appeared in the reflections. In the next section, the findings are presented for each theme (university strategic planning and holistic faculty evaluation) in order of the RQs.

Figure 3. Highly frequent words

Findings

Reflections on university strategic planning

Issues & implications (RQ1)

Despite the stated goals in the university strategic plan, our participants have not observed any tangible changes in the evaluation of faculty contributions to I&E during the P&T process, nor significant changes to university, college, or department P&T guidelines. They believed the I&E activities are well received as "add-ons" to traditional measures of performance and impact. They asserted that the use of a university-wide template for faculty evaluation guidelines provided departments and colleges with an opportunity to reevaluate their criteria and expectations of what constitutes impact, according to their disciplines, but they also stated most units incorporated the examples provided in their language without much explanation as to how it applied to their disciplines. One reason might be the fact that the Covid-19 pandemic in addition to changes in leadership at the university and college levels and massive reorganization halted discussions about changes in university-wide guidelines to make them more inclusive and to "broaden the bar" and on the training needed for faculty being reviewed and those who review them.

The study participants believed when faculty members are evaluated annually or as part of P&T, they are expected to demonstrate the impact of their work in all areas of responsibility. In most institutions, their impact is demonstrated based on traditional academic standards such as peer reviewed publications, citations, grants, books (monographs), edited books, conference proceedings, teaching, mentoring, service, etc. However, our participants emphasized that academia is changing, and faculty are hired to engage in teaching, research/scholarly/creative activities and service that have societal impact. There are many activities such as those related to I&E and diversity, equity, and inclusion (DEI) which have a significant societal impact but are not evaluated or properly valued in P&T. They thought this needs to be addressed since our institutional mission, vision, and strategic plans consider I&E and DEI central to our strategic goals and core values.

The participants in this study also pointed out that most strategic plans are developed because of a requirement. However, once approved, sometimes due to changes in leadership, they merely become documents on the website and there are no organized efforts to implement the initiatives and effect change to meet the goals. Our participants concluded that to implement the required changes and develop university, college, and department P&T guidelines that address activities such as I&E and DEI, creation of a strategic plan is not sufficient. They believed the strategic plan must also include a plan of next steps and expectations of how the strategic goals will be implemented across the university. Our participants also thought faculty at the college and department level must engage in discussions about how best evaluate and value I&E activities specific to their discipline. In their perspective, collaboration with university level offices including the provost, undergraduate studies, graduate and professional school, research, faculty affairs and faculty senate are essential to make significant advances in this area.

Participants in this study argued that unless faculty perception of what "impact" means and how it is "measured" changes, we will continue to devalue faculty's contribution to I&E and its societal impact. And if not valued, then there is no incentive to pursue those areas. Therefore, strategic planning is essential to set goals for the near future. However, a plan without a follow-up strategy of how to implement it does not result in the changes needed.

Recommendations (RQ2)

Participants in this study strongly recommended better communication and discussions across all levels (university administration, college and department leadership and faculty as change agents) to better align our strategic goals in the area of I&E with P&T guidelines. They believed, from these engagements, training can be developed not only for how to best engage in I&E activities, but also how best present and evaluate the work. As per the PTIE Coalition recommendations, they agreed that this will require a

top-down bottom-up engagement if the university aspires to meet its strategic goals. In their perspective, this cannot be achieved in the absence of trust.

Our participants agreed that the university leadership must make clear that I&E activities are valued and should be rewarded in the P&T process as indicated in the strategic plans. In their view, the university leadership must also communicate that I&E are central to academic institutions societal impact. By communicating the university recognition of I&E and its alignment with its mission and goals, faculty will be more open to engaging in such activities and learn how to best evaluate them.

In summary, our participants asserted communication and engagement across all university levels (administration and faculty) as well as trust are essential to address the importance of I&E to the university mission and strategic goals and why/how we should make changes to the P&T process to better recognize and value it.

Figure 4 is a concept map summarizing the key statements of the participants' reflections on university strategic planning.
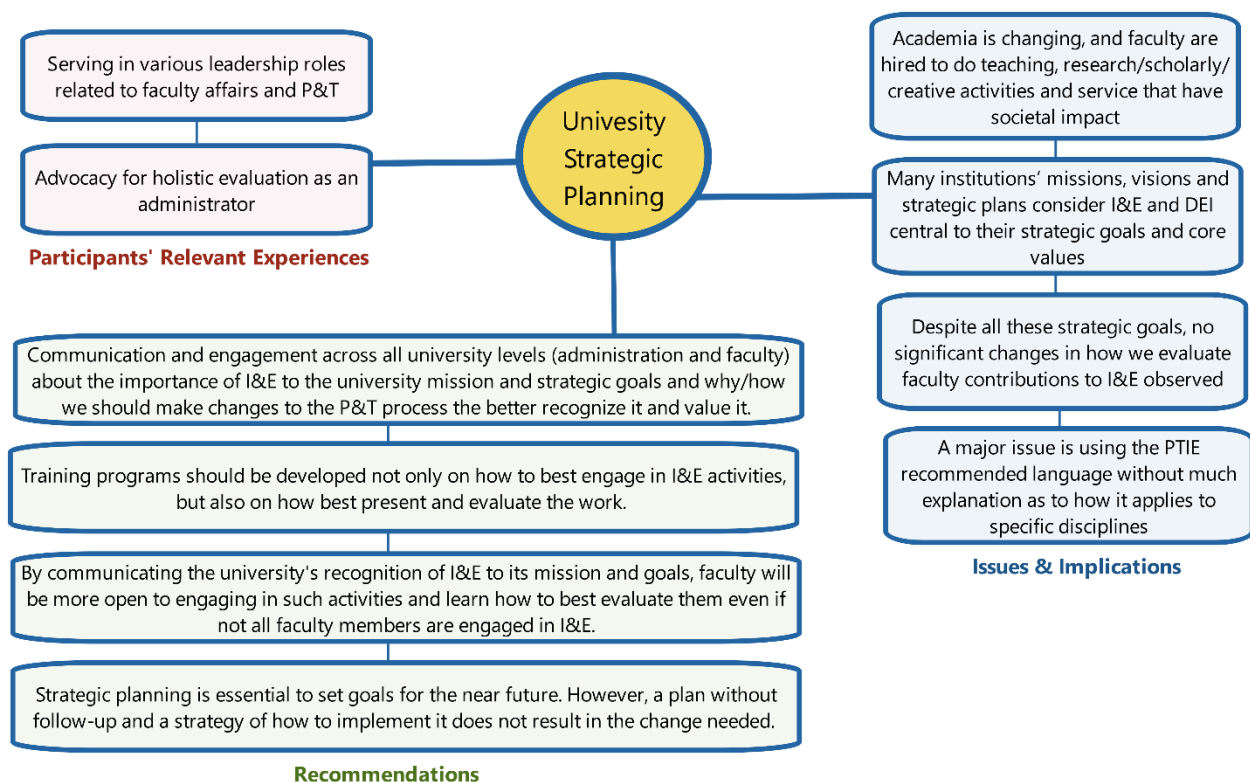

Figure 4. Reflections on university strategic planning

Reflections on holistic faculty evaluation

Issues & implications (RQ1)

Participants in this study argued that the concept of "holistic review" is well established as an approach to improve upon a process in which quantitative metrics have taken on too much weight in decision making. For example, when colleges and universities are interested in diversifying their student body but recognize that does not occur with their standard academic metrics-based approaches.

Concerted efforts first in research on, and then training about, implicit bias and its role in recruiting faculty who are diverse relative to the endemic faculty are common these days. Our study participants believe recognizing recommendations for avoiding that bias, not only requires search committee members to challenge their concepts of ideal candidates, but also, not allow assumptions or hearsay to enter into their rankings of candidates. University and other initiatives have certainly increased the demographic diversity of recruiting, however, all too often retention is an issue. This study participants believe this is associated with the reliance on P&T processes that are built upon those serving on the committees perpetrating upon the next group the same narrow scrutiny and rules of thumb they faced. However, it stands to reason that with a more diverse faculty, we are more likely to see diversity in approaches to scholarship, which then would not be resilient to those constraints. They also thought that diversity serves as a clear example of how exploring institutional goals and values, as well as roles for various faculty during the P&T process would likely result in greater societal impact over time. It is also illustrative of how early in initiatives unforeseen consequences of the prevailing inflexible system run counter to the goal, resulting in making academe less desirable and less egalitarian.

Participants in this study identified applying holistic review to RPT as a form of universal design that allows the system to be more cognizant of the various contributions of faculty. Much like demographic diversity, they believed disciplinary diversity or diversity in approaches to scholarship would not be likely resilient to rigid quantitative standards or timelines within RPT. Thus, they argued that the system acts to select against these new approaches or goals.

Throughout the reflections, the participants pointed out that the impacts that faculty have not only lived discretely within traditional metrics (publication numbers, impact factors, grant dollars, journal quality, courses taught, frequency of teaching, student course evaluation data, topics taught, service to department, college, university, disciplinary associations), but also, in advancing in new areas, may require more effort or trial and error. Therefore, they believed recognizing that effort and progress during P&T requires considering the full picture and appreciating the potential. Conversely, they argued overvaluing the metrics can create pursuit of the metrics rather than pure pursuit of the scholarship, resulting in delays of advancements and loss of potential. In their perspective, scholars develop habits of mind and skills that serve the pursuit of the

metrics and thus they reinforce in themselves overvaluing the metrics when they evaluate others.

Done well, the participants believed holistic review of faculty is an act of appreciative inquiry. In this model, the P&T reviewers seek to discover the best of what the scholar has done with their career within the probationary period, or the preceding year(s) in the case of annual performance review and promotion, respectively. When conducting a holistic review, reviewers place that inquiry in the context of a broader vision of what academia can and should be, what each department/college and the broader university values are. In this way, according to our participants, holistic review is human-centric, with reviewers effectively seeking to make a case for the candidate. The implication of this shift in approach in their proposed model is that colleagues are likely to gain a greater appreciation of each other's work, no doubt resulting in a higher probability of collaboration and networking. But the broader implication, according to the participants, is a system that encourages and celebrates the wide variety of impacts faculty may have, thus, avoiding the selection that might overly constrain innovation and contributions a faculty member might be uniquely or rarely capable of doing. In their view, persistence of an appreciative approach creates a virtuous cycle of holistic awareness. This allows for improved recognition of the strengths of members of both the department/college and institution. But also, they believed this sort of engaged and structured review of colleagues serves as a form of assessment for the department/college or institution, identifying recurring issues and highlights the need for greater mentoring and faculty development.

Recommendations (RQ2)

According to the participants in this study, holistic review relates to appropriateness and variety of the reviewers involved in the process. They believed the creation of guidance that prompts appropriate review of teaching would help to ensure selection of those faculty with familiarity with evidence-based pedagogy to review a candidate's teaching approach. Similarly, the colleagues preparing the scholarship report should be appropriate for comprehension of the candidate's scholarship outputs. Further, they believed all involved should be engaged and inclined to address any concerns raised within the letters from external reviewers, especially if contradictory to the university values, mission, vision, and goals.

In their perspective, encouraging holistic review of faculty across the annual review, P&T, and post-tenure review, requires persistent advocacy for the approach. Our participants emphasized that in any given year, several academic leaders are new to their position and need to recognize their role in mentoring faculty, advocating formal mentoring among faculty, encouraging holistic annual review of faculty, and holistic approaches to P&T and post-tenure review. To accelerate the acquisition of those skills, they recommended recurring leadership programming and developing resources.

Additionally, they stated faculty would be traversing from one career stage to another and facing new challenges every year. Therefore, they believed those development programs remain essential. Finally, they highlighted the will to advocate for holistic review would require consistent support from those who run college and university-level processes. Given the frequent turnover in leadership, our participants suggested those working on this issue should consider institutionalizing their efforts in the university rules, standard administrative procedures and guidance documents.

Figure 5 is a concept map summarizing the key statements of the participants' reflections on faculty holistic evaluation.
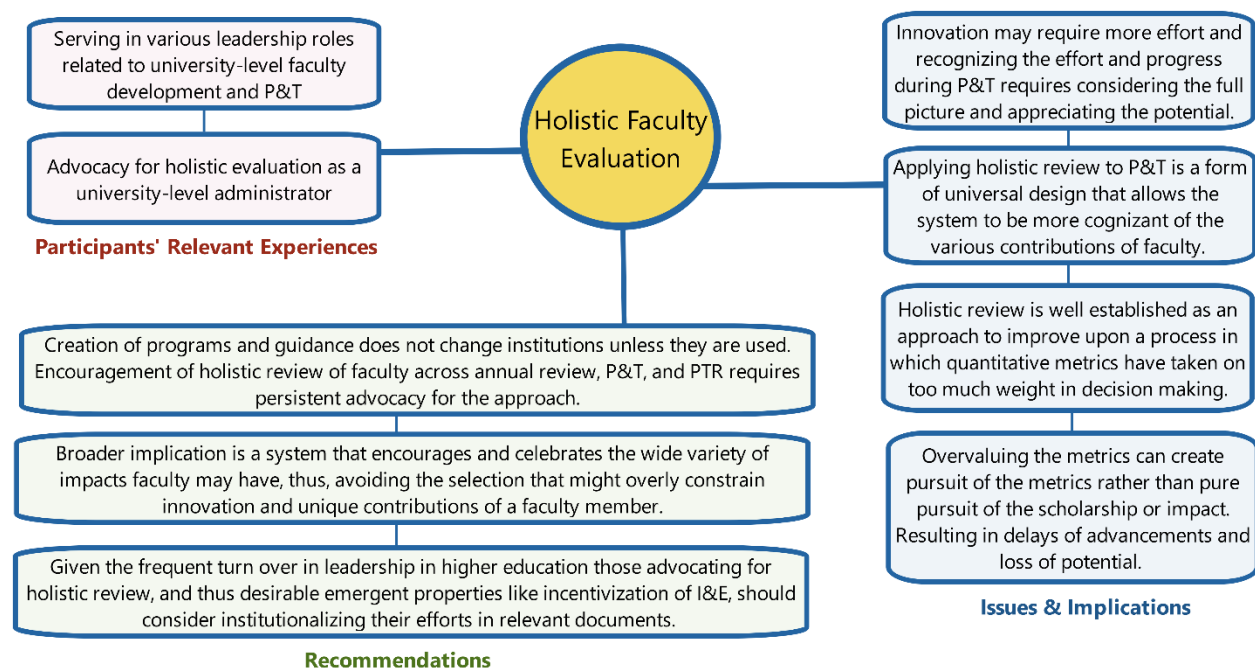

Participants' Relevant Experiences
- Serving in various leadership roles related to university-level faculty development and P&T
- Advocacy for holistic evaluation as a university-level administrator

Holistic Faculty Evaluation

Issues & Implications
- Innovation may require more effort and recognizing the effort and progress during P&T requires considering the full picture and appreciating the potential.
- Applying holistic review to P&T is a form of universal design that allows the system to be more cognizant of the various contributions of faculty.
- Holistic review is well established as an approach to improve upon a process in which quantitative metrics have taken on too much weight in decision making.
- Overvaluing the metrics can create pursuit of the metrics rather than pure pursuit of the scholarship or impact. Resulting in delays of advancements and loss of potential.

Recommendations
- Creation of programs and guidance does not change institutions unless they are used. Encouragement of holistic review of faculty across annual review, P&T, and PTR requires persistent advocacy for the approach.
- Broader implication is a system that encourages and celebrates the wide variety of impacts faculty may have, thus, avoiding the selection that might overly constrain innovation and unique contributions of a faculty member.
- Given the frequent turn over in leadership in higher education those advocating for holistic review, and thus desirable emergent properties like incentivization of I&E, should consider institutionalizing their efforts in relevant documents.

Figure 5. Reflections on holistic faculty evaluation

Concluding Remarks

This paper was presented in the 2022 PTIE conference to contribute to our understanding of the significant roles of university strategic planning and holistic faculty evaluation in achieving PTIE goals. Valuing diversity in approaches to scholarship is a common theme across the reflections. Both participants also believe that creation of programs and guidance does not change institutions unless they are used, and therefore underscore the importance of creating communication networks across different levels of faculty and administration leadership to inclusively institutionalize PTIE recommendations. They also point out such great changes in RPT requires persistence and resilience by stakeholders. As institutions and societies gradually change, the evaluation systems must progressively reflect the new realities and complexities of societal needs and therefore value the diversification of faculty work.

In summary, we believe strategic planning determines the mission, vision, and goals of higher education institutions and it must be followed by an implementation action plan that should require the PTIE recommendations. The four core elements of PTIE recommendations should subsequently advise and reinforce the implementation of holistic faculty evaluation for RPT. Figure 6 shows our suggested model for how to consider and include university strategic planning and holistic faculty evaluation in the context of PTIE recommendations.

Figure 6. University strategic planning and holistic faculty evaluation in the context of PTIE recommendations

Readers should bear in mind that this study was aimed at providing insights and recommendations for the 2022 PTIE conference from the perspectives of two administrators. Therefore, they should address our findings cautiously with regards to the specific context, values, mission, and vision of their institution as our reflections may not be generalizable due to such differences.

Research on the lived experiences of RPT administrators is warranted given the importance of their role and practice in fulfilling the goals of PTIE. We hope to see more qualitative research in the future investigating into the insights and recommendations of

academic leaders who have spent many years implementing and improving faculty evaluation systems in higher education.

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Author Biographies

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Blanca Lupiani, Ph.D., is a professor of veterinary pathobiology in the College of Veterinary Medicine & Biomedical Sciences at Texas A&M University. She is an immediate past Dean of Faculties and Associate Provost. She has overseen and streamlined functions related to faculty affairs and promotion and tenure, increasing both transparency and accountability. Under her guidance, faculty and leadership development programs were significantly expanded, and ADVANCE was institutionalized within the Office of the Dean of Faculties (now Faculty Affairs).

Appendix 1

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Reflection Protocol

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PTIE: Reflections on University Strategic Planning and Holistic Faculty Evaluation

Note: Please bear in mind that you do not need to respond to all of the questions in each section. In other words, questions in each section (What, So What, Now What) are meant to guide us through our reflections in order to systematically investigate into our lived experience and deconstruct it. To this end, some questions might be more or less relevant in the context of your lived experience; and therefore, you might want to remove and/or add contextually [ir]relevant questions in accordance with the purpose of each phase of reflections which are 1) description of the lived experience/phenomena (WHAT), 2) building theory and knowledge about the lived experience/phenomena (SO WHAT), and 3) providing action-oriented recommendations for future (NOW WHAT).

What?	So what?	Now what?
Descriptive level of reflection	Theoretical and knowledge building level of reflection	Action oriented level of reflection
What is the reason for considering university strategic planning & holistic faculty evaluation important with regards to PTIE? What has been my role in and involvement with university strategic planning & holistic faculty evaluation? What did I learn? What was I trying to achieve? What actions did I take? What was good or bad about the experience? What feelings did it evoke in others? What were the consequences?	So what does it tell me about my learnings, attitudes, and methods? So what roles do university strategic planning & holistic faculty evaluation play in relation with PTIE? So what was going through my mind as I acted? So what is the importance of university strategic planning & holistic faculty evaluation? So what other knowledge can I bring to PTIE considering my involvement with university strategic planning & holistic faculty evaluation? So what could I have done to improve it?	Now what do we need to do in order to make things better and improve PT? Now what broader issues need to be considered if this action is to be successful? Now what might be the consequences of changing the situation? Now what planning is required to activate the new direction?

	So what is my new understanding of the situation?	