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Intentional Stakeholder Engagement that Fosters Innovation and Equity

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We have no conflicts of interest to disclose.

Intersection: A Journal at the Intersection of Assessment and Learning
Vol 2, Issue 3, 2021

Abstract

This article summarizes the findings of the Grand Challenges in Assessment working group that was established to create plans to "produce visible and actionable assessment findings that drive innovation" by increasing stakeholder engagement with assessment data and processes. We describe the use of a stakeholder engagement framework to intentionally plan engagement opportunities, ways to present data that are meaningful and comprehensible, and other approaches to empowering stakeholders to collaborate with faculty and administrators to improve learning environments in higher education. Thoughtful engagement of stakeholders that attends to power dynamics can amplify voices of those not typically heard which can encourage more innovative practices.

Keywords: stakeholder engagement; data visualization; empowerment; Grand Challenges in Assessment

Introduction

Spurred by the Black Lives Matter protests in the summer of 2020 after the murders of George Floyd, Ahmaud Arbery, Breonna Taylor, and others, much discourse in higher education has shifted to themes of equity and anti-racism (Clayton, 2021). This article adds to the conversation about equity, inclusivity, and innovation within the field of higher education assessment by pushing the conversation toward the role of diverse groups of stakeholders in contributing to assessment conversations and decisions. It also encourages faculty and assessment professionals to be more intentional in the ways in which they engage stakeholders and attend to power dynamics during interactions with stakeholders.

This article comes out of work done as part of The Grand Challenges in Assessment project (Singer-Freeman & Robinson, 2020a; 2020b). A team of sixteen assessment professionals from across the United States considered ways to increase the extent to which assessment professionals "*Produce visible and actionable findings that drive innovation.*" We present insights from our group's readings and ideas that emerged from our discussions as we wondered what it would look like if assessment professionals were to be more innovative and inclusive in engaging stakeholders. Ultimately, we wanted to know how to engage well with diverse groups of people, defined broadly, with the intended outcome of driving innovation and improvement in higher education.

Authentic Stakeholder Engagement

Authentic stakeholder engagement that results in critical insights which can be used to improve student learning and educational experiences requires *intentionality*. Engaging stakeholders with intentionality requires the establishment of conditions that foster equitable participation, the careful selection and display of evidence for analysis, and invitations to the right stakeholders at the right time.

Some assessment findings about student learning and experiences are made visible only by gaining different perspectives from a variety of stakeholders. Those who are impacted by the teaching in our institutions (e.g., current and former students, faculty from other departments, employers, patients, and student affairs professionals) can provide insightful observations or ask questions that program faculty may have not thought to ask. They may interpret results or identify root causes using a different lens than teaching faculty. For example, alumni and employers can share insights about what alumni need once they are working or emerging needs in industries that employ graduates. And student affairs professionals can provide insight into how they see students using or struggling to use general education competencies in co-curricular and extra-curricular spaces. They can also help faculty to drill down and identify deep reasons to support both the academic and personal development of students.

Stakeholder engagement is also critical to the pursuit of equity (Partners for Each and Every Child, 2016; Montenegro & Jankowski, 2020). Educational leaders must engage historically excluded voices to ensure that policies and changes benefit all students. Skilled facilitation and breakout groups can help diverse groups of stakeholders contribute productively.

Additionally, careful selection of and engagement with stakeholders can elevate voices that have not been previously amplified and result in productive conversations about power and transparency. When the environment is intentionally managed, stakeholders can be key to driving innovation.

Guided by our readings and discussions, the Grand Challenges group concluded that an ideal environment for stakeholder engagement is characterized by the three areas of activity described below.

1. Choosing, revising as needed, and implementing a stakeholder engagement framework for program and institutional assessment work
2. Empowering stakeholders by presenting appropriate data in clear and accessible ways
3. Attending to power in relationships among stakeholders and in program- and institution-level decision making

Stakeholder Engagement Frameworks

Intentionally using a stakeholder engagement framework helps create a coherent view of who the stakeholders are, how frequently they should engage, and the level of collaboration that is asked of them. Cousins and Chouinard (2012) provide a conceptual framework that highlights three dimensions of collaborative inquiry: control of technical decision making, diversity among stakeholders selected for participation, and depth of participation. Guijt (2014) encourages practitioners to consider who should be involved, why these individuals are the right representatives, and what is the best way to engage these people using an appropriate and context-specific participatory approach.

The Australian Midwifery framework is a good example of a comprehensive stakeholder engagement framework (Australian Nursing & Midwifery Accreditation Council, 2017). The Australian Midwifery Framework proposes that stakeholder interactions should be purposeful, relevant, honest, inclusive, and responsive. The framework offers an ordered continuum of ways to create stakeholder interactions. For example, stakeholders can be informed, consulted, involved, collaborated with, or empowered. The framework describes the characteristics of each level of engagement, the goals for each level of participation, the promises made to stakeholders at each level, and examples of engagement tools.

An Example of Successful Adaptation of an Engagement Framework

The first author's institution was struggling to engage diverse groups of stakeholders in the interpretation of assessment findings. The institution lacked a sense of which stakeholder groups programs should engage with, how to collect feedback, or what kind of interactions to promote. The institutional Assessment Council researched existing frameworks and selected the Australian Midwifery Framework as the basis for a modified framework (see Figure 1).

An important step in the adoption of a stakeholder engagement framework is making modifications that are appropriate for the institution. The institution re-envisioned the shape of the framework, to evoke the sense that all levels of engagement are desirable; the level of *Inform* is not inherently less important than those of *Collaborate* or *Enable*. Each is appropriate under different goals of engagement. *Involve* and *Collaborate* were not meaningful distinctions for the institution so they were collapsed. Both internal and external stakeholders can have a significant positive impact on curriculum and assessment design (Lindsten et al., 2019; Ulewicz, 2017). To encourage faculty to engage a broad range of stakeholders, diverse groups of internal and external stakeholders were enumerated in the center of the graphic. Finally, to emphasize that the goal is *intentional* engagement, this phrase was placed in the center circle; it is only by intentionally selecting the right group of stakeholders, for the right purposes, at the right level, with the right goals in mind that we can gain insights needed from diverse perspectives to improve student learning and experience.

The institution now has each program report its most substantial stakeholder engagement from the previous year by level and frequency for each of the listed stakeholder groups in the model. At the institutional level this provides a snapshot of the stakeholders who are being engaged and how they are being engaged (Moreno & Tucker, 2021). Program reports allow assessment professionals to provide feedback to programs to ensure diverse stakeholder engagement. For example, a program who is informing students might be encouraged to go further by being told, "you have done a great job informing a wide variety of stakeholders and soliciting their input. Next year, consider engaging students collaboratively."

Some faculty and staff have reported that the framework helped them see that they had been engaging more stakeholders than they initially thought. Others said the framework helped them strategize how to engage stakeholders more intentionally. Figure 1 depicts the framework that makes sense for one institutional context. Other institutions will likely have different needs requiring different adaptions. Most important, is to have some sort of guide for thinking about stakeholder engagement that is widely adopted and aligned with assessment processes.

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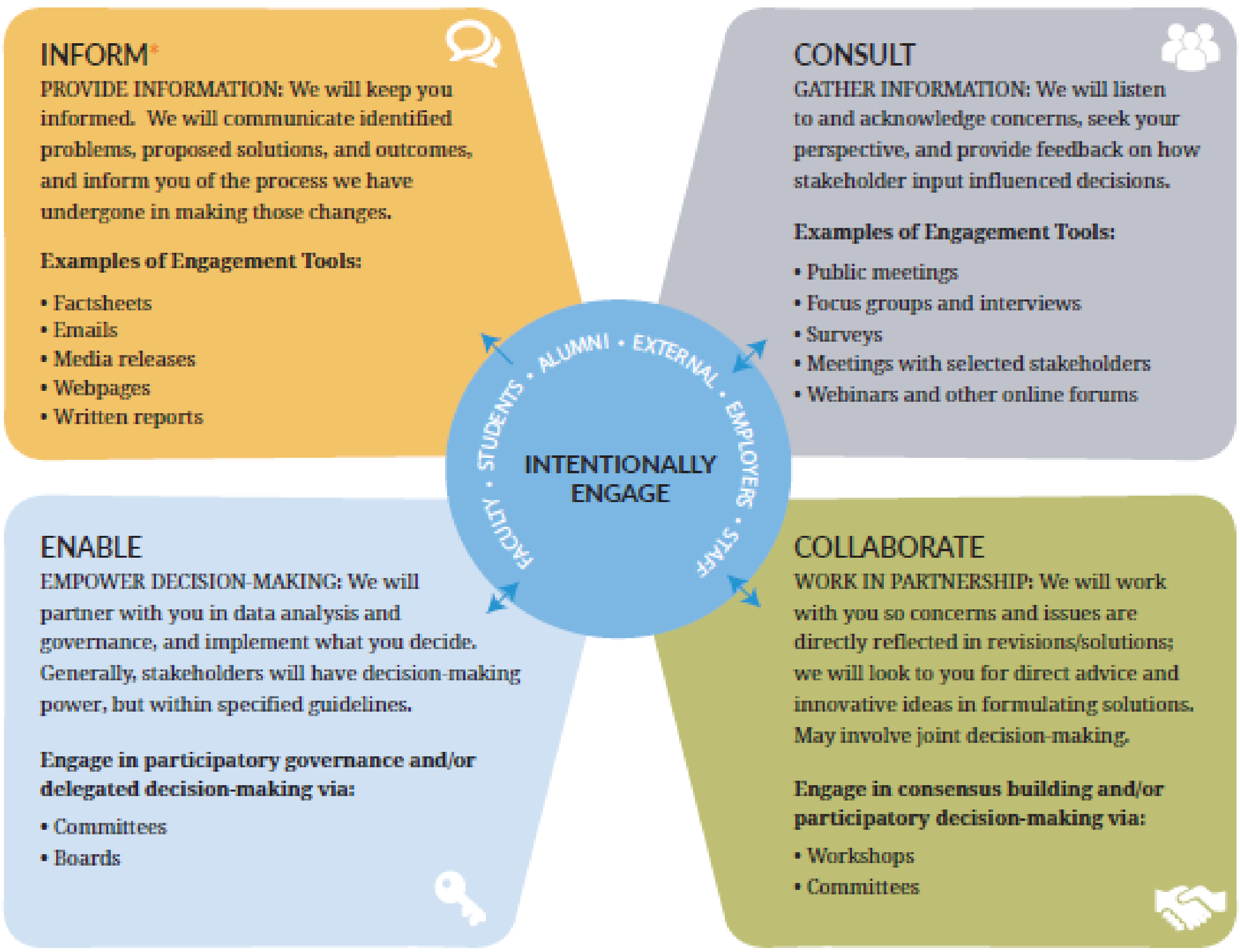
Figure 1. *Stakeholder Engagement Framework Adapted for Use at One Institution*

PURPOSE: Using this framework can ensure stakeholder engagement with assessment is integrated and undertaken in a coordinated manner.
HOW TO USE: Choose stakeholders, engagement levels, and engagement tools based on goals for the engagement.
KEEP IN MIND: Successful stakeholder engagement is purposeful, relevant, open, inclusive, and responsive.



Adapted from Australian Midwifery and Nursing Accreditation Council: https://www.anmac.org.au/sites/default/files/documents/stakeholder_engagement_framework.pdf

Additional Uses for Engagement Frameworks

1. Ideally a framework like this would be used at all levels of a university. Beyond just the program-level, central administration should use the framework and model intentionality in stakeholder engagement to the rest of the university. When sharing decisions made, faculty and administrators can communicate which stakeholders were engaged at which level and through which methods and how they influenced those decisions. This

increases transparency and contributes to a culture of assessment on campus.

2. Post your engagement framework in visible places (hard copy and electronic) and encourage others to refer to the framework when considering whether the perspectives of all stakeholder groups are being considered in programmatic and institutional decisions.

3. Ask for stories about how programs or schools are including a wide range of stakeholder groups in their decision making.

Stakeholder Empowerment

Creating authentic stakeholder interactions requires thinking through the principles, groups, and levels of engagement. Once the type of interaction (method, level, and frequency) has been decided, the next step is to focus on what happens during the interactions in a way that accounts for power dynamics, the stakeholder's background knowledge, and the stakeholder's comfort with the discussion topics.

Research has shown the engagement of diverse stakeholders empowers marginalized groups and increases equity. In particular, we want to encourage empowering members of two groups: those who are not faculty or administrators in assessment work, and those who do not represent the status quo in higher education. For example, to sustain educator evaluation reform among Colorado's 178 school districts, a range of stakeholder groups including the state department of education, school districts, school boards, teachers, union representatives, principals, parents, students, educators in higher education, and business members were provided with different levels of responsibilities and a clear communication plan (Behrstock-Sherratt, et al., 2012). These groups who are not typically together and often disagree about educator effectiveness were provided with opportunities to hear varying viewpoints, negotiate differences, and build consensus for policy success.

The Council of Chief State School Officers' (2016) provides a helpful set of tables to use when making decisions about engaging stakeholders. Although designed to be a K-12 document, it does a nice job of exploring different ways to approach aspects of stakeholder interactions. For example, when clarifying goals for stakeholder engagement, the document suggests creating a vision, disseminating it, making connections to support the goals, being transparent, and identifying the stakeholder role in goal setting. For each step, the chart provides basic and advanced levels of practice. Similar sets of guidelines are provided for preparing accessible materials, speaking to your audience, and creating long-term relationships with stakeholders.

Our review of these materials and experience in higher education assessment brought us to the identification of two key elements that are necessary to foster a productive and empowering stakeholder interaction: 1) ensure that the data provided to stakeholders is meaningful, easy for them to understand, and visualized well; and 2) attend to power dynamics in the interaction. We discuss these in the following sections.

Providing Meaningful and Accessible Data

While identifying and engaging the appropriate stakeholders is essential, providing stakeholders with easily digestible information is also important. Many colleges and universities have increased the extent to which they effectively deliver information by reducing reliance on tables and text. This often is accomplished through visualizations, dashboards, and automated reports. Data visualizations bridge the gap between stored, static data (numerical or narrative) and stakeholders who need to make timely, informed, data-driven decisions. Innovative data visualizations simplify complex, static data sets by making data interactive. Accessible interactive data increase the ease with which stakeholders can move from data to decisions and action plans.

Supporting stakeholders in making data-based decisions may require creating data visualization resources at the institutional or college level. Data visualization tools such as Excel, Abode, Power BI, Tableau, or Infographics are often used in institutional research and information technology offices (Slater et. al., 2017) but may not be software everyone involved with assessment is comfortable using. To support faculty and staff in using these resources, we recommend collaborating with institutional research or information technology staff to explain how to read, analyze, and use data visualizations.

Also consider offering an institutional data academy to build awareness and knowledge of effective methods for communicating data. A data academy could include instruction on the following topics: using catchy titles that summarize data to guide the reader to the purpose of the data presentation (Phillips & Horowitz, 2017); using colors or bold text to help readers understand data quickly (Evergreen, 2020); using charts and graphs to demonstrate alignment between teaching activities, assessment methods, and learning outcomes (Vaitsis et al., 2014); using interactive dashboards to present data in a dynamic and easily consumable format (see the website of Association for Institutional Research).

Referring to your stakeholder engagement model can help guide decisions about data sharing. It is vital to understand stakeholders' expectations and requirements for data visualizations by considering whether the goal is to inform them, consult them, involve them, collaborate with them, or empower them. Given different interests and backgrounds, different stakeholders will need different things from data visualizations (Valle et al., 2018). For example, while an institutional executive team needs high-level, high-impact data visualizations that tell a holistic story, faculty and academic advisors might be more interested in student-level data to identify which students are at risk.

Telling Data Stories

In the age of big data, it is not uncommon that massive data have been collected, but they are not presented, digested, and used properly or in a timely manner. Nonetheless, the expectation for faculty, administrators, and other stakeholders to be informed is greater than ever. To make data meaningful, it is important to add context. Assessment results should be presented in a way that captures the full story of the success or failure in the achievement of an outcome. By telling a complete story in addition to sharing numeric values, stakeholders learn the "why" of what happened in the implementation of a strategy. Data stories help capture important information about implementation fidelity and other factors that impact success. Accordingly, a complete data story can increase meaningful reflection, continuous improvement, and innovations.

Gale et al. (2019) describe an innovative way of presenting data to stakeholders using a data lab approach. A data lab promotes community-engaged meaning-making in which assessment is framed as a skill that belongs not only to administrators but to any stakeholder who is interested in continuous learning through reflective practice. Stakeholders move through the stations which contain different artifacts such as student journals, reflection papers, survey results, syllabi, and learning outcomes. At each station, stakeholders answer questions about the learning they see documented in the artifacts. The facilitators encourage conversation about the learning stories and gaps the attendees see documented in in the artifacts and probe metaphors and other descriptions about the learning that was shared. The key of the data lab methodology is to identify and develop a metaphorical concept by examining a mix of direct and indirect measures, and of qualitative and quantitative results. Through the lens of attendees' own inquiry, metaphors are generated collaboratively as a playful way to create a shared understanding of analysis and interpretations, and to help generate new insights. Gale et al. argue that this approach increases stakeholder contribution through democratic engagement and builds strong relationships between facilitators and stakeholders which can improve institutional assessment culture, encourage innovation, and increase creative thinking about learning on a campus.

Attending to Power

Power is relevant at all levels of stakeholder engagement. Indeed, even informing stakeholders of changes can be communicated in a way that is clear, inclusive, and provides a way to ask questions, or presented in a way that is ambiguous, authoritative, and does not provide a way to seek clarification. At the core of useful and impactful stakeholder engagement is a trusting relationship (Public Agenda, 2017). Faculty and administrators who seek to engage with stakeholders must plan ways to effectively cultivate relationships with groups of stakeholders who have less authority, are cautious about an institution's intention, or find universities to be intimidating spaces. When cultivating relationships in ways that minimize power differentials it is important to:

1. **Be patient**. Some stakeholders will require assurances, conversations, or established relationships before they are willing to provide feedback and act as partners in the assessment process. Be open to the idea that engaging some individuals will not happen immediately and assume that some will choose not to participate. Stakeholder groups that may require careful establishment of trusting relationships include indigenous students or community members (Bird-Naytowhow et al., 2017), other marginalized populations such as transgender individuals (Tebbe & Budge, 2016), and students who have had traumatic experiences in general or with the educational system (Davidson, n.d.).

2. **Be prepared**. Do not waste stakeholders' time. When a facilitator is not prepared it can communicate a lack of respect to stakeholders. To communicate respect, it is important for the facilitator of a stakeholder engagement session to provide clear instructions; describe a defined purpose; make sure everyone knows what to expect from the interaction and why they were invited at this point in the assessment cycle. To determine whether you are creating a process that respects all stakeholders ask yourself, "do the people at the table have a just and reasonable way to impact the interpretation of this data or use the findings?"

3. **Be equitable**. There may be complex power dynamics among the various stakeholders you engage. Power dynamics can be influenced by identities, hierarchies, previous interactions, competing goals, and structural inequities. It is essential to create an environment in which power differentials are limited to the extent possible. Take time to uncover beliefs and biases at the beginning of stakeholder engagement interactions. Making hidden or unrealized assumptions visible to all at the table can help facilitate more equitable engagement (activities to help create shared assumptions are available in WestEd, 2017). To ensure equitable representation in stakeholder engagement sessions, consider compensating marginalized or less powerful stakeholders for their labor.

   During the session, consider setting group norms for the interaction and using tools or signals that ensure everyone's voice is heard. Be sure to provide interpreters if needed and fully address any other accessibility needs. It can also be worthwhile to use facilitators who share identity or other similarities with the stakeholders who lack power in the group. For example, underrepresented ethnic minority, first generation in college, or student facilitators can help balance power. Another way to be equitable is to avoid jargon or specialized terminology, and to ensure all participants have the information they need to understand the topic at hand (Behrstock-Sherratt et al., 2013).

4. **Be curious**. Engagement is not over once a meeting ends. Equity requires ongoing curiosity about the extent to which power was effectively shared. The Australian Midwifery framework (2017) discusses the value of robust review and evaluation of interactions with stakeholders and the importance of being willing to adjust future activities based on evaluation findings. Facilitators can support relationship-building by evaluating interactions for authenticity, effectiveness, opportunity for collaborative meaning-making, and respect. This can be done by informally talking with stakeholders about the engagement activity or collecting information more formally via a survey. When reviewing the evaluative information, reflect on whether all voices were heard and influenced the conversation. If the goal was to pass decision-making power to stakeholders, examine whether all stakeholders were a full part of the decision-making process. Being curious also entails checking back in with stakeholders to find out how they perceive the implementation of the plan they participated in creating and looking to them for real-time adjustments as needed (Center on Great Teachers & Leaders, 2014).

To ensure that stakeholder engagement activities are supporting equity and sharing power, consider creating a checklist for stakeholder empowerment and using it before and after stakeholder interactions to prepare and reflect. If faculty are responsible for facilitating sessions, it will be important to provide professional development sessions that introduce some of the best practices described above. During these sessions encourage departments across disciplines to share what has been helpful as they engage local stakeholders so faculty and administrators can learn from each other. McCauley and Cashman (2018) provide a detailed resource from the K-12 world. A section on Instructional Transformation is easily transferrable to university-level teaching, learning, and assessment. This section encourages three main “habits of interactions” throughout all stages of the stakeholder engagement process: coalesce around issues, ensure relevant participation, and work together; it includes reflective questions to guide facilitators toward accomplishing these goals in equitable ways. We recommend this resource for those who would like to be more intentional about equitable stakeholder engagement.

Conclusion

The ideas, tools, and frameworks in this article focus on the importance of being intentional in how we engage assessment stakeholders. This includes inviting stakeholders to generate questions, investigations, and reflections on findings and possibly to participate in decision-making informed by data. Making sure stakeholders understand the context, the data, and the goals for the engagement will build trust and help faculty and administrators learn as much as possible from stakeholders’ participation. Through authentic stakeholder engagement we can drive innovation and improve learning by creating intentional and equitable spaces for stakeholders to collaborate with us. Ultimately, this improves stakeholder feedback and empowerment, which can pave the way for more innovative and equitable curricula, assignments, and environments in higher education.

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Acknowledgement

The authors would like to acknowledge the teamwork and collective contributions of our Grand Challenge group, *Producing Visible and Actionable Assessment Findings that Drive Innovation*, chaired by Dr. Carley Dear and Dr. Melissa Williams. The authors would also like to thank Katherine Forney for her artistic rendering of the OHSU Stakeholder Engagement Framework.

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