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Consequences of contemplating on a conference session: Assessment professional as mediator: Nixing the mystery and myth and supporting narration

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Author Note

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Abstract: The skills required of assessment professionals are wide and varied, but research over the past decade has brought a focus on interpersonal skills as a key component of the assessment professional's toolkit. Relationship-building forms the basis of interpersonal communication with stakeholders at all levels and the assessment professional often plays a significant role in telling the story of assessment to a variety of audiences. Through the discussion of two case scenarios during our conference session, we anticipated delving into what it takes to build relationships with program faculty to encourage them to confidently tell the stories behind their assessment of learning data. What we observed occurring during the discussions was a focus on practical solutions to the assessment problems presented. This led us to question why our intended goals were not fully realized. Through further discussion, research, and evaluation of the assessment landscape of today, we came to the conclusion that a capacity-building toolkit is needed, both for individual assessment professionals to achieve personal growth and career progression, and for institutions to strategically build and develop effective assessment offices and institutional effectiveness units. This paper raises a call for action to address this need and we stand ready to play our part in achieving this goal.

Keywords: *toolkit, capacity-building, assessment professional, skills, professional development*

Introduction

Today, colleges and universities collect a plethora of information about student learning but there seems to be a continued struggle with how to take the complexity of that data, choose what to share, and communicate a clear and meaningful picture of the learning experience, as indicated by the quote in Figure 1. Evidence-based storytelling is a highly effective approach to accomplishing this (Jankowski, 2021). It involves identifying appropriate student learning data and using it to craft an effective narrative. Presenting data in this fashion is more engaging, influential, and digestible to a variety of audiences. Relationship building is an especially important aspect of an assessment leader's role to help facilitate storytelling, as is implementing an organized, strategic communication plan. These enable assessment professionals to nurture a culture where evidence-based storytelling is the norm.

Figure 1

Challenges - Communicating Information (Quote).

> "Communicating effectively about student learning remains a challenge. Colleges and universities must more clearly and persuasively communicate relevant, timely, and contextualized information on their impact on students and value to society" (Jankowski, et al., 2018)

Relationship building, combined with strategic communication and organization, are key skills needed by assessment professionals, and this was the foundation of our session design for the Association for the Assessment of Learning in Higher Education (AALHE) 2023 Annual Conference. As any good assessment professional would do, we articulated intended outcomes for our session:

Through engaging dialogues around case scenarios, participants will gain –

1. greater insight into how the assessment leader can create and develop mentoring relationships with program faculty and staff to guide continuous improvement.
2. strategies for guiding program faculty and staff on how to use narratives/storytelling to share complex data about student learning.
3. strategies for developing a project and communication plan that fosters organization, collaboration, and professional development in assessment.

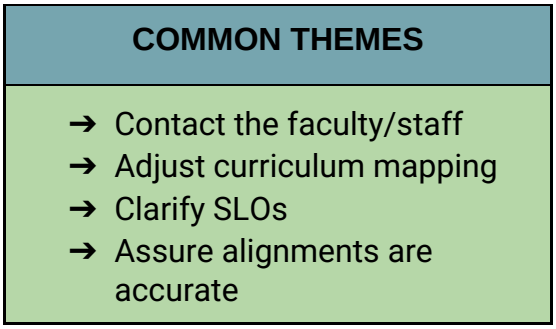
Unfortunately, we did not realize all our session goals, although the session was remarkably well-attended for being scheduled at 7:45am on the last day of the conference, and several participants told us after the session that they enjoyed it and found it useful to their practice. As we have worked together on this paper for the Conference Proceedings publication after our time in New Orleans, we have tried to identify why we were unsuccessful in meeting our goals for the session. What have we learned from this, and does it really matter? This sounds like a familiar situation in the world of assessment!

We chose a dialogue session format to provide a forum where attendees could engage in meaningful conversation about interpersonal skills and qualities needed to be a leader in the field of assessment. Building on prior AALHE conference sessions, we aimed to guide participants to reflect upon their own identities as assessment professionals within the context of their institutions as well as more generally in the field of assessment. To accomplish this goal, we designed opportunities for attendees to engage with one another through examining case scenarios and responding to guiding questions we cultivated. Through these conversations we hoped participants would gain greater insight into how an assessment

professional can create and develop mentoring relationships with program faculty and staff to guide continuous improvement. The scenarios presented to attendees for discussion were examples of typical problems assessment professionals often face. The first case described a department's persistent reluctance to address disappointing results regarding a student learning outcome related to developing teamwork skills due to small sample sizes annually. The second scenario presented a situation where a proposed new program contained courses from more than one department. The department that was to manage the degree program believed they would be unable to assess learning taught in classes from another department, despite acknowledging that the knowledge and skills acquired in those courses were key components of the program's learning goals. As facilitators of the session, we curated themes from the participant discussions (see Appendix A). Figure 2 illustrates the common themes that emerged from these discussions.

Figure 2

Common Discussion Themes



Even with highlighting the use of interpersonal skills as an effective approach, the themes from the participants' dialogues primarily focused on evaluating tasks and processes for possible errors and contacting faculty and staff to fix them rather than using relationship-building skills like those presented in the RARE (Relate, Acknowledge, Reflect and Empower) Model (Clucas Leaderman & Polychronopoulos, 2019; Polychronopoulos and Clucas Leaderman, 2019). In reflection, we attribute this to the differing ways they identified as assessment professionals within the context of their roles, and the pathway they took to the position (i.e., prior roles as faculty, teaching and learning, technology).

Project management and strategic communication are fundamental skills needed by assessment office staff in order to be effective (Ariovich et al., 2018; Morrow et al., 2022). Assessment professionals typically juggle multiple priorities that require skills to be able to organize and prioritize tasks all while meeting deadlines. At the same time, they facilitate collaborative conversations with a diversity of stakeholders that requires strategic communication skills. Recognizing this, we provided an example project and communication plan template with an accompanied visualization that can aid in fostering organization, collaboration, and professional development (see example illustration in Appendix B).

We did not observe participants focusing on interpersonal skills (i.e., relationship-building) in their approaches to handling the problems outlined in the scenarios during the session. Attendees remained focused on practical solutions to the presented problems (See Appendix A) instead of thinking more broadly about the interpersonal skills and qualities an assessment professional needs to possess to build relationships. We discovered that participants exhibited a variety of perspectives on who an assessment professional is, which varied even further by institutional composition and the number of years in assessment. As we concluded the session by introducing the project and communication plan template, we noted that participants had a keen interest in using this resource back at their own institution, which was further confirmed by the few evaluation survey responses we received. Participant engagement peaked a bit with questions related to using it at their institutions. This reflection left us with more questions as to what the next steps should be.

Post-conference conversations involved us both independently sharing our concerns about the direction of this paper. Having both done some further research of the published literature on the topic of what makes an effective assessment professional, we asked ourselves “What value did our session add?” We also recognized that, over the past decade or so, the published literature on this topic has stagnated, with a series of articles that generally summarize and confirm what has already been found and stated, without any real forward movement with regards to addressing the identified needs of the assessment profession. Consequently, the outcome for this paper is somewhat unexpected and unintended from what we envisioned at the outset – we raise a call for action and propose a set of recommendations for a more proactive and strategic approach to defining and developing the roles, traits, and skills necessary to be an effective assessment professional and run an effective assessment office.

The Assessment Professional’s Identity Conundrum

In 2015, Jankowski and Slotnick defined five roles of an assessment professional: assessment/method expert, visionary/believer, narrator/believer, facilitator/guide, and political navigator. Having found that little research had been conducted on this aspect of the field of assessment up to that point, their study prompted some new research to determine the nature of the assessment profession, primarily through surveys and interviews with professionals actively working in the ever-evolving field of assessment (Ariovich et al., 2018; Horst & Prendergast, 2020; Nicholas & Slotnick, 2018). At the 2019 AALHE Conference, Polychronopoulos and Clucas Leaderman explored the professional identity of those working in assessment and asked “Who are we?” (2019). They presented their RARE Model and have continued to work on this suggested approach for assessment professionals, grounded in the work of counseling theory and practice, presenting their latest thoughts and findings at the 2023 AALHE conference and elsewhere. This body of work led to a special issue of the Research and Practice in Assessment journal in 2022, focused specifically on the characteristics and needs of assessment professionals (Vol. 17, Issue 2).

We now have a clearer picture of who is entering, and working in, the field of assessment as an assessment professional and know that the route to this career is varied and non-linear (Grillo Pinnelli, 2020). We have confirmation that the five roles laid out by Jankowski and Slotnick in 2015 are fairly

robust and comprehensively describe the nature of the work of an assessment professional. We have garnered information from professionals in the field about their professional development needs and there has been a proliferation of professional development offerings from a variety of organizations operating within the general sphere of assessment work in higher education. Yet, many questions remain. The classification of assessment work remains unsettled. Is it a field or a profession? Or both? What is the level of leadership needed? (Polychronopoulos & Clucas Leaderman, 2019). Nicholas & Slotnick determined that further research is needed to define the skills required for assessment leaders to be effective within the context of different institution types and sizes (Nicholas & Slotnick, April 2018). These uncertainties impact the assessment professional's identity.

While Nicholas & Slotnik's work in 2018 revealed that many assessment professionals operated at the level of middle management within their institutions, they suggested that more assessment professionals needed to be at the tables of upper-level management within the organization to gain greater integration of assessment work into institution-level decision-making. Grillo Pinnelli (2020) conducted a study on the career paths and advancement of institutional effectiveness (IE) leaders (assessment professionals included in sample) into senior level positions. Eleven leaders from a variety of institutional contexts were interviewed. The finding of the study confirmed there is no singular career trajectory to entering the field or a clear pathway to advancement into higher level positions in the field of IE, including assessment. One observation made from the interviews was that the participants expressed their higher management positions within their organizations provided them greater opportunity to impact change. Further research in 2022 revealed that assessment professionals were to be found at a range of levels of leadership within higher education (Morrow et al., 2022), suggesting that the recommended change is taking place, to some degree. Still, career progression for the assessment professional remains somewhat of a mystery, lacking any clear guidance on the skills and experience needed to strategically move up the career ladder.

What does it take to be an effective assessment professional?

Research in recent years has shown that there are many paths to becoming an assessment professional (Grillo Pinnelli, 2020; Polychronopoulos & Clucas Leaderman, 2019; Prendergast et al., 2022). This may be because the nature of the work is wide and varied in scope. Jankowski and Slotnick's (2015) original five essential roles of assessment practitioners – assessment/method expert, narrator/translator, facilitator/guide, political navigator, and visionary/believer – have largely been confirmed by subsequent research with some refinement. Ariovich et al. (2018) combined the facilitator/guide and political navigator into a single role, based on their research, and determined that change agent was a better term than visionary/believer. Analysis of the responses from the Watermark Survey conducted in 2016, which was one of three data sources used by the authors, led them to add the role of project manager to the list. Some overlap between the roles was recognized and we would posit that our professional experience involves using all of these roles in different contexts and at different times, as required. The work of an assessment professional is multi-faceted and requires awareness, both of our own personal strengths, traits, experience, and biases, and of those with whom we work (Morrow et al., 2022; Wilkins & Donat, 2021). The skills required to be an effective

assessment professional may be crudely distinguished as functional, interpersonal, and collaborative skills.

Functional, Interpersonal and Collaborative Skills

The collaborative White Paper published by AALHE and Watermark identified the top two desired professional development topics sought by assessment professionals as data analysis and interpretation, and documenting assessment results and reporting (Ariovich et al., 2018). Six major topic areas for professional development were identified that could include both functional skills (such as data analysis methods) and interpersonal and collaborative skills (e.g. best practices in assessment, collaboration). Morrow et al. (2022) surveyed assessment professionals across the nation via online survey and gathered information on perceived needed skills (92 of them) organized into nine categories. Interpersonal skills were found to be the most salient theme with high numbers of respondents rating skills in this category as important or very important. Prendergast et al. (2022) confirmed the importance of communication skills and various "people skills", including listening, patience, kindness, collaboration, and flexibility. Assessment professionals interviewed as part of their research study identified the role assessment leaders play as ambassadors for the importance of assessment. Grillo Pinnelli (2020) identified the most important competency outside of foundational knowledge was possessing higher level communication skills. Tkatchov, Dale, and Brandwein (2019) shared how high-quality assessments could be achieved through collaboration between faculty and assessment professionals. Clearly, there is some consensus on the key skills required for effective assessment to occur, yet no central information hub exists to convey this information clearly, either to institutions seeking to create or develop effective assessment offices, or to individuals seeking to enter the field and develop a career path.

Where to go next?

Our post conference deliberations of where things need to move, combined with a subsequent review of literature, showed there is a continued stagnation in moving forward in developing and defining the roles, traits, and skills of assessment professionals. The absence of such guidance may be impeding how executive leaders of institutions are organizing their colleges or universities around assessment (i.e., size of office, reporting structure, skills needed for its functions, type of leader). Consequently, we are recommending three strategic and proactive approaches to moving things forward.

Recommendations

The function of assessment is often viewed as synonymous with IE and this may be contributing to the ambiguity surrounding the roles of assessment professionals. To address this, our first recommendation is for all those working in the field of assessment to be intentional and consistent in clarifying that assessment is one of several aspects of IE. Such deliberate clarification will help to differentiate the distinct roles within IE and ultimately, lead to greater clarity around what an assessment professional does, what skills they need to be effective in their roles, and what kinds of professional development they need to continue being effective. Distinguishing the various functions and roles within IE is intertwined with our next two recommendations.

Current research highlights continued differences in understanding what an assessment professional does or should be doing (Ariovich et al., 2018; Morrow et al., 2022; Nicholas & Slotnick, April 2018). Given this, we recommend the field should formally "solidify" a set of competencies that are at the core of all assessment professionals' roles, regardless of institutional type or size. This set of core competencies should take into consideration the interconnected relationship between the assessment professional (responsibilities), the institutional context, and the external quality assurances (accrediting bodies). Figure 3 illustrates the interconnectedness of these relations; however, a more detailed model needs to be developed that conceptualizes the importance of alignment between these three key aspects. Detailing and conceptualizing this relationship is important, as it will help in developing the core competencies that an assessment professional needs.

Figure 3

Relationship Consideration in Assessment Role

Our last recommendation concerns further defining what roles and skills are needed to be effective assessment professionals. The development of a capacity-building toolkit is suggested that will guide colleges and universities in defining their assessment needs and structuring resources for effective and meaningful assessment. Experts in the field of leadership and organizational development, like Adrianna Kezar (2018), have written extensively on how institutional representatives can identify roadblocks within institutions, organize themselves to build capacity, and enact change. These works do not provide a toolkit for institutions to use that is dedicated purely to assessment, which may explain why there continues to be such a broad array of job titles, functions, and reporting structures for assessment at colleges and universities. We propose a capacity-building toolkit that has more than one purpose and includes an inventory for identifying assessment needs at the institution, steps to set up an office that supports key assessment functions, and guidance on developing job descriptions for hiring key staff, like the assessment leader. The toolkit should also include criteria for further development of assessment professionals as leaders of assessment and beyond.

Summary

AALHE was founded to provide an opportunity for assessment professionals to network and collectively develop the field of assessment through professional development, scholarship, and collaboration after the demise of the American Association of Higher Education in 2005 (AALHE guiding documents). Much work has been accomplished by this member-driven organization since its inception and yet there remains a lack of clear articulation of the nature of professional assessment work in higher education. Further work is required to guide both institutions and individuals towards effective assessment practices and careers. AALHE is a place for assessment professionals at all stages of their career and the membership includes a wealth of knowledge and expertise. Recognizing that we are just two seasoned assessment professionals and AALHE members, we see a lack of a central hub for institutions and individuals to find information on how to address institutional and personal professional needs for effective practice and career progression. The information exists and continues to be expanded upon. We would like to conclude by raising a call for action, to bring all the pieces together into a coherent and comprehensive repository of resources that may be built upon and improved as the research, scholarship and sharing of effective practices continues. The development of a toolkit for capacity building around assessment is within our grasp and would truly add value to the assessment landscape that exists today.

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Appendix A

Case Scenarios

Scenario One - Teamwork in the World of Widgets

The Department of Widget Technology has an Associate's degree program in Widget Production. One of the program learning outcomes is that all graduates will be able to work effectively as part of a team. Assessment results in the final semester Capstone class for the program indicate that this learning outcome is not being met by most students, and this has been the case for three years now. Yet, each year's assessment report dutifully reports these figures and then states that no actions will be taken in the upcoming year because the number of graduates in the capstone class that year is too small to be able to make any decisions.

Guiding Questions

- What's the problem?
- What might be helpful strategies you could use, as the Assessment Professional, to guide the program faculty towards deeper analysis and telling the story of "all things teamwork-related" within the program?

Participant Responses

- Look at trend data
- Develop a curriculum map
- Are you assessing the right way?
- Formative assessments
- Is the outcome really important?
- Reach out to the faculty - is this what they see?
- Equity - every student's learning experience matters (addresses small N)
- Are the criteria for teamwork specified and can be disaggregated?

Scenario Two - Data Analytics Across Borders

The Computer Technology department is proposing a new degree program in Data Analytics. The curriculum includes courses taught by other departments, including the Math department. When working with you, as the Assessment Director, to develop an assessment plan for the new program, the lead instructor states that they cannot assess the statistical abilities of the students because that occurs in courses not taught by Computer Technology where the degree will be managed. He does, however, confirm that a knowledge of statistics and the ability to apply the principles correctly is an important aspect of the students' learning in the program.

Guiding Questions

- What's the problem?

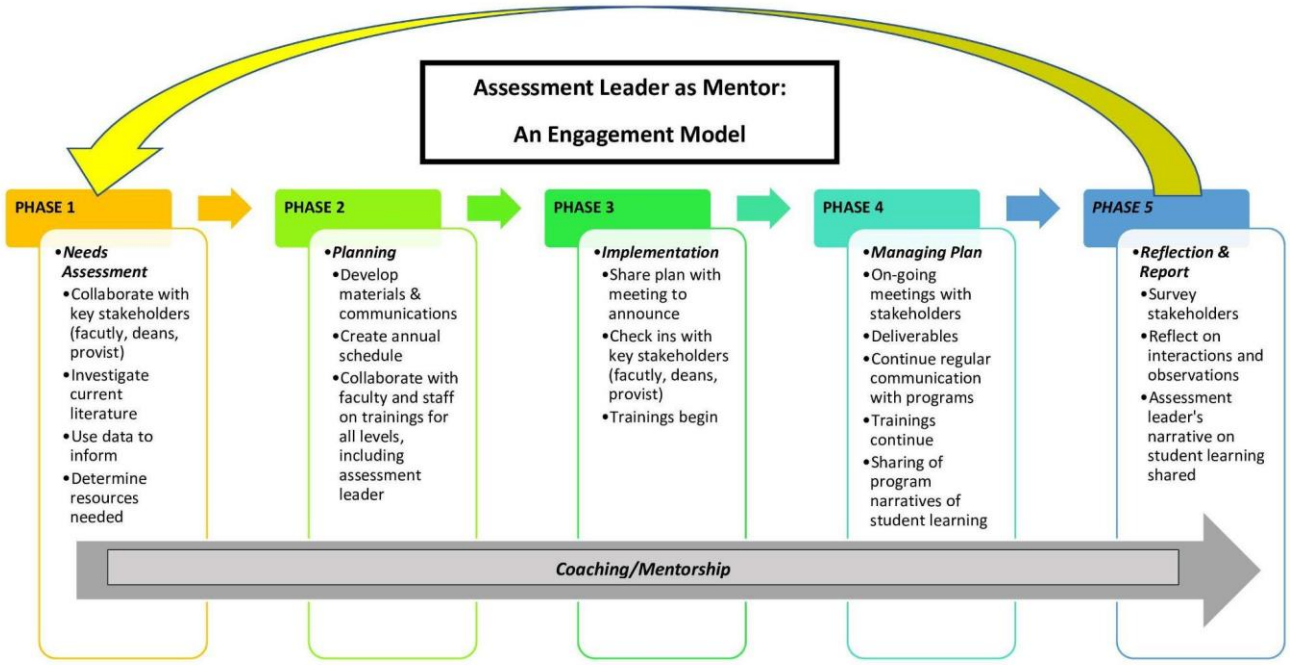
- What might be helpful strategies you could use, as the Assessment Professional, to guide the program faculty towards a more collaborative approach to program-level assessment focusing on the intended student learning rather than the administrative logistics?

Participant Responses

- Clarify the SLOs
- Get the two disciplines together to discuss alignment and assumptions
- Ensure alignment of statistics needs/teaching/assessment
- Curriculum map would help
- Levels of learning mapping (related to curriculum map)

Appendix B

Example Visualization of Engagement with Faculty and Staff



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