

National Forum of Chief Engagement and Outreach Administrators

Notes of Proceedings, May 18- 19, 2017

University of Minnesota-Twin Cities

Threats and Challenges

Attendees had a group discussion to identify specific internal and external threats and challenges that chief public engagement officers face when institutionalizing public engagement at their home institutions. From this discussion, a set themes emerged, which included:

- Lack of resources (financial, human resources, etc.)
- Segmentation of resources and activities at institution
- Alignment with various university priorities
- Competing university priorities
- Legitimacy of public engagement in the academy
- Defining engagement
- Assessment and impact of engagement work
- Return on investment and justifying work
- Threats to institutional environment (political, economic, etc.)
- Reactive rather than strategic
- Building trust both internal and external
- Leadership transitions/importance of leadership
- Cultivating the next generation of public engagement leaders
- Clarity of job description for lead officer
- Volatility of external environment
- High expectations from communities

In small groups, attendees addressed some of the above themes and identified potential strategies that would address the specific threat and challenge. As part of this discussion, the groups developed catchy titles for each of the theme areas.

Theme: Segmentation of resources and activities at institution

Title: What are we calling this?

Strategies:

- Capitalize on younger faculty who are passionate about public engagement to advance the public engagement agenda
- Embrace the advantages of decentralization
- Recognize and accept that there are multiple purposes for engagement
- Collaborate with other units to determine what parts of the engagement agenda should be carried by specific units
- Connect with President regarding the impact of engagement

Theme: Alignment

Title: Better Together

Strategies:

- Build authentic relationships that recognize and mitigate power dynamics
- Organize engagement work through strategic areas, such as geographic or issue-based
- Respect diverse perspectives
- Promote citizen science

Theme: Legitimacy of public engagement in the academy

Title: But does it matter?

Strategies:

- Build legitimacy of community-based work as an academic pursuit for faculty and students
- Use language carefully to describe/define community-engaged scholarship
- Build partnerships at the highest levels of the university to support public engagement and embed it in goals and policies
- Position public engagement within the mission areas of the university
- Track promotion and tenure policy reviews in order to lobby for greater public engagement representation in promotion and tenure policies
- Utilize seed funding to embed public engagement in courses
- Require all departments to have a community engagement plan

Theme: Defining engagement

Title: You know it when you see it

Strategies:

- Rely on national definitions of engagement which draw on previous work/commissions, such as Carnegie, Lynton, and Boyer
- Develop and articulate an understanding of the field on campus

Theme: Building trust both internal and external

Title: Just trust us!

Strategies:

- Gain buy-in of faculty, as well as administrators, on merits of public engagement
- Form a community engagement faculty committee or council to identify faculty needs in order to conduct and grow community engaged scholarship and experiential learning
- Gain buy-in from Board of Regents and elected officials
- Communicate to communities our shared mutual self-interest
- Communicate the benefits to community partners
- Be willing to allow your partners to take branding lead and take credit for work
- Build long-term relationships with partners

- Train faculty with case studies on best practices for partnering with communities
- Promote humility

Theme: Leadership transitions/importance of leadership

Title: Surfing the wave when the Big Kahuna changes

Strategies:

- Support institutional transformation over one-off projects
- Embed engagement into departmental practices
- Model best practices for managing an efficient, high quality unit that provides value to campus partners
- Tie engagement as a solution to what senior leaders are challenged by
- Overcommunicate

Theme: Cultivating the next generation of public engagement leaders

Title: Mentors and Protégés

Strategies:

- Identify what needs to be accomplished and build strategies to link resources
- Cultivate new talent beyond the usual suspects
- Create interdisciplinary fellowships for graduate students interested in doing engaged work
- Establish developmental and programmatic opportunities for undergraduate students, such as work study positions

Theme: High expectations from communities

Title: You expect me to do what?

Strategies:

- Coordinate with key and relevant units (Government Relations, President's Office, Equity and Diversity, etc.) to understand what the expectations are from particular external stakeholders
- Clarify parameters of the institution's and communities' capacities
- Establish a set of guiding values to evaluate partnership opportunities and to determine which expectations to meet
- Consider if your institution is the best fit for partnership or if there are other institutions that would be a better match
- Align language to specific audiences when communicating about the university's work

Examining the Politics of Engagement

Context (Jennifer's notes)

The meeting then turned to a discussion about the role of institutions of higher education in the current political environment. Depending on an individual's political persuasion, institutions of higher education can be seen as a bedrock of values or bastions of ultra-liberal ideologies. To address this issues, three chief public engagement officers from a private institution located in a progressive state, a public institution in a conservative state, and a public institution in a moderate state provided their thought and advice on how to navigate in the current political landscape.

The panel began with a conversation about how to advance public engagement at an institution while at the same time acknowledging both the freedoms and constraints that specific institutional cultures and context provide. Overall, the panelists iterated that it is critical to identify how public engagement supports the mission of the institution and how, by advancing public engagement, the institution will be more apt to reach set goals. In addition, all panelists agreed that it is critical for public engagement centers and units to not necessarily take on specific issues, which may be seen as political, but rather exist to support the efforts of faculty, staff, and students.

One panelist explained that his office is often approached to make statements regarding local or national issues. His center now uses the "No, Support, Facilitation, Lead Scaffolding" framework to determine how the center should proceed. In this model, they first research what the issue is, decide if university resources should be used to respond to the issue, determine if the university is going to openly support the issue, and finally determine if the university should play a leadership role addressing the issue. He explained that this framework has been helpful in assisting the university and his center on how to move forward with particular issues.

The panel then discussed a national report that was recently released that criticized student civic engagement participation in academic coursework as a way to promote a liberal agenda. The panel debunked the report and urged those in the field to communicate with their stakeholders about how integrating experiential learning into coursework is a best practice in education and is part of an international field of higher education. The panel then recommended that chief public engagement officers need to do a better job of telling our story and the impact of our work to help people understand what we are doing; the message is that we are convening, supporting, and facilitating activities with the community in order to advance the mission of the institution. Institutional public engagement work only works when institution goals meet community issues.

The conversation finished with strategies that chief engagement officers can use to address current community issues that reflect positively on their institutions. The panelists reiterated the importance of metrics and documenting outcomes as result of engaging with communities, although they all acknowledged that this is very challenging to do well. As much as possible, one panelist recommended documenting the collective impact of all engagement work, not just project by project. One panelist mentioned that although comprehensive data is often hard to

compile for engaged work, the power of stories is very compelling for institutional leadership, communities, and legislators.

2:00 PM Enhancing the Role of the Chief Engagement/Outreach Officers

(Respondent and Presenter: Dr. Maureen Reed)

Dr. Reed: Your work is important. Your offices are the faces of your institutions to your communities. These are the questions that we pose when we think about our engagement efforts: What about the private good vs. public good of education? How does it change over time? Duality of engagement: projects and outreach that are transactional vs. those that are transformative? How does it help us communicate and evaluate differently? What are some of those outreach/engagement projects that have a delivery time that are short or long term? What does this mean for how we think about projects? How we make decisions about methods we use to divide scarce goods? How do we deploy resources—by what rubrics do we decide?

Questions from the audience: When to apply leadership and how to make calculations on when and how to leverage and not leverage it? As public institutions, what can we do better? How do you navigate perception of the public on transactional vs. transformational outcomes? How did you come to the realization that community engagement is so vital?

Dr. Reed: Not even 2 percent of the general population knows what you do. People have no idea. This did not used to be true. Farmers, miners, loggers, etc. had a better sense of what the universities were doing for them. Is it worthwhile to educate the general public or just to remain obscure? Election shows rejection of elitism for people to tell others what to do--- referendum of elites. Thus, the general public doesn't have a favorable view of higher education.

Facilitator: If families see the university as a private good, why do we have this pressure to do engaged work?

Dr. Reed: I have grappled with this for a long time. I think of a public good as something that we all want and we all want more of AND that we are all better off if all of those people have more of it too. I might not perceive that if others are educated, that my life is enhanced. How do we help the public understand this relationship?

Facilitator: There is a great deal of public service that is happening, but we get accused of not doing enough. For those responsible for the engagement agenda, what should we do differently? How can we better build our capacity to be more effective?

Dr. Reed: We will never get to a place where we have nothing else to do. The list of things that we have already done will pale in comparison to the things that still need to be done. We should remind ourselves that we have accomplished a lot already. How do we prioritize the work that needs to happen? Who puts the demand on the institution for particular areas of work? Are the routes of inquiry and request equitable? If there are groups in the population that are not aware of the services the university can provide, they are at a disadvantage to those populations that are already connected. How intentional can we be as an institution to reaching out to communities that we are not as connected with? How do we get the inputs?

Facilitator: Are we proactive or responsive to issues? Academia has its own culture that one must ascribe to in order to be successful. The academic culture can be very confining to meet

the needs of the communities outside the university. How do we educate each other about the cultures and the cultural divide?

Dr. Reed: There is a cultural divide and it is very large. We need to ask communities more, what do they want and what do they need? When we go into communities it is interrupted as hubris, elitism, arrogance. Is it? Sometimes, yes. It is not always that, but it is interrupted that way. The public remembers for a really long time if they were treated in a way that demeaned them. We have to give agency to our communities so that they more directly tell us what needs to be done.

Facilitator: A lot of us have moved away from projects, but rather moving the institution to be an engaged institution. What is your recommendation to take charge on to really make a transformational move? Where do you see points of leverage?

Dr. Reed: I'm sure that the offices represented here will be doing a deep work with the communities for a long time before your reputation is going to catch up with you. We often think: how can we tell our story? Who can it be to communicate these stories to the community? If community-recipient of the service are happy with it, they will be happy to talk about it.

Facilitator: Some communities are voiceless and powerless. How can we give them voice and empower them to speak.

Dr. Reed: It's important to have a clear, simple message for the community and legislators. You have to give them a 3-minute version. They will make their decision within the first 30 seconds. It's essential for us to educate ourselves on how to tailor messages to different audiences.

Facilitator: How did you come to the realization of the importance of PE work?

Dr. Reed: Not right away! I started thinking, how do we resurrect the notion of education for the public good? 60-80 years ago we went through a similar process: considering education as a private good, then public good, etc. These steps help underscore the importance of engaged work:

1. standing on the mission
2. we're immersed in this work, how do we tell those stories with what we're doing with people
3. private/public good: winds are changing, need to recalibrate
4. attune to community needs, listen more
5. communication – share your 3-minute version, use different language
6. think of communication at the beginning, not the end
7. we're not nimble enough to transact our needs: think how to be more nimble

What you do matters – both to those who know and to those people who will never know. Look at Nobel Prize winners – they sacrifice a lot for their work but they're the most persistent. Persistence is the difference between a successful and an unsuccessful effort.

3:30 PM Working through Critical Issues: Case Studies

Case Study 1:

Issue: A tenured faculty member at a university issues a series of tweets on politically charged topics. The university issued a few statements condemning the tone of the tweets but, overall, protected its faculty's freedom of speech.

Solutions/Discussion:

- The university could use it as a learning opportunity to set up a series of workshops and talks to teach students. But, where to draw the line? – The universities have to determine how to respond from the institutional standpoint or to tell people where the line is, where the academic freedom ends and hatred and bigotry begins.
- The institutions have to create a safe space for students to come and talk about it, to discuss and make sense of it.
- The mention of 'safe space' brought the discussion to the idea of safe spaces and their controversy. Is there a value for students to say 'I don't want to hear about it', 'I don't want to know about it'? It was suggested to use the idea of 'brave' instead of 'safe' spaces to have difficult conversation even if people do not feel that they are ready. Having these spaces and talking to the students takes courage and pushes the students and the faculty out of their comfort zone.
- The university should also look into the content of the faculty member's classes. Does he create adequate spaces for students to be open in his classes or are they intimidated by his style?
- A lot of faculty use social media as an academic tool. How to uncouple their own views from their roles as faculty members?

Case Study 2:

Issue: A new initiative was launched as a partnership between the local city and the institution to foster the mutual benefits of all. There is not one particular person/office who is charged with leading this initiative. The initiative is not particularly embedded with the University. There exist a rather difficult relationship between the mayor and the president. There is also a lack of ownership over what the initiative should accomplish.

Solutions/Discussion:

- Need to have additional offices included in the initiative;
- Need to increase resident engagement;
- Organize a session to determine what success looks like for each of the parties involved and where there is an overlap;
- Determine who is going to be responsible for implementing parts of the plan;
- Talk about priorities and what is going to happen first;

- Assign a lead person for each of the priorities identified;
- Involve an interdisciplinary research team to determine options for improving the neighborhood dynamics—East Carolina State has a model for this;
- Look into developing a 501c3 and then channel the funds through to hire a staff person to oversee the work of the initiative;
- Explore best practices with other similar initiatives, look at other models for how the work is being done.

Case Study 3:

Issue: There are several offices that have an engagement function as a part of their mission and operations.

- Overlapping organizations and responsibilities;
- Incompatibility of the centers;
- New people are coming and they don't know things are in place;
- People are territorial, worry about the allocation of resources, so they compete with each other;
- Faculty are confused about where to look for resources;
- Those administrative leaders have different roles and are involved in different councils;
- Not everybody is doing engagement because the term 'engagement' is defined differently for different units

Solutions/Discussion:

- Consider the strengths and limitations of each organization, filling the gaps;
- Gather everybody and have a conversation about collaboration;
- Come up with the overall engagement plan and see what organization fits in the picture, really does not matter who is doing it;
- Keep everyone in the loop as a start;
- University-wide initiatives, which give the folks the clear understanding what they need to do and where to find resources;
- Develop strategies with narrower audience in mind;
- Help organizations to have better communication with the community, help them see themselves as representatives of the university, help send messages to different audience;
- Accept the shared responsibilities and reach an agreement.

Friday, May 19, 2017, 9:15am- 10:00am

Capacity for Influence: Optimizing the Role of the Chief Engagement/Outreach Officer

Guiding question: As chief engagement officers, what is our capacity for influence change and advancement? How do we maximize influence? Participants discussed this questions at their tables and 7 key themes emerged:

1) Align engagement initiatives with university priorities across organizational levels.

Groups discussed the importance of linking the engagement agenda to institutional mission and leadership priorities. “It must be part of who we are as an institution” declared one leader. Another leader discussed focusing on the president’s priorities and aligning the work with his/her priorities and “pain points.” In general, an effort should be made to understand what senior and departmental leaders are trying to achieve and position engagement to achieve these goals. One participant described this as a “reverse conversation” focusing on the needs of the unit and how engagement could address these needs. In supporting these goals, engagement leaders should strive to “provide more than what is asked for” in order to help colleagues and educate them.

2) Strategic monitoring and measuring

Participants emphasized the importance of monitoring and measuring engagement activities and outcomes across the institution. Many leaders discussed strategies for embedding engagement metrics into faculty annual reviews in ways that are aligned with larger institutional priorities (e.g, Carnegie classification application, grants applications, etc.) One person posed the question, “What data are you collecting and why?” It was suggested that leaders should investigate information that is missing, think about what questions to ask, and then consider the assessment needed to cover the gaps. Key informants related to the monitoring and measuring process include deans, departments, and other campus units (student affairs, athletics).

3) Strategic communications: managing meaning and messaging

.Participants talked about the challenges of developing common understandings about engagement across the institution. This might be interpreted as “managing meaning” of engagement among stakeholder groups (including board members, donors, faculty, etc). Engagement leaders must work closely with central campus communications to develop the story of engagement within its institutional narrative. Participants advised that one must provide data tied to talking points, and tell the stories behind the data. Engagement leaders should meet with the presidential speech writer to discuss language that is comfortable for the president. In addition, it was suggested that leaders consider how engagement can bring positive recognition to the campus through the press and competitiveness for national awards. One participant emphasized the importance of seeking awards for which the president could write a letter of support and subsequently learn more about engaged work.

4) Leverage engagement to support fundraising goals

Groups engaged in significant discussion about the role that engagement can play in supporting university advancement goals. The main advice is to meet with campus advancement leaders to learn about their fundraising plans and ways that engaged work--and engagement leaders themselves-- can support these plans. Some participants discussed successful strategies of helping other units raise money for engaged teaching, learning, and scholarship. As one person suggested, “Garner resources and give them to others.” In being a wise steward of gift money, one person emphasized the importance of “doing good things with good people...using small

investments to build transparent and honest relationships, showing the activities and results.”

5) Identifying and cultivating change agents (internal and external) to support engagement as an institutionalized practice.

Participants discussed the importance of identifying and cultivating relationships with internal and external influencers who can help institutionalize engagement on campus. They talked about the importance of building networks, and being “multi-lingual” in order to effectively communicate about engagement across stakeholder groups. One person suggested that leaders should be prepared to provide a 3 minute presentation to a donor about engagement and a longer explanation to faculty members. In other words, one must be able to speak at a high level, or at a level for people new to the concept. Knowing one’s audience and where to engage them on these topics is critical (one person gave an example of meeting at a wine bar after work). Campus business and financial officers should be important allies, not an enemy. One effective strategy is to leverage decisions among councils that push the agenda, so the initiative is not viewed as being promoted by a single engagement leader.

6) Support human resource efforts: recruitment, training, and development

Participants discussed the importance of supporting human resource efforts related to recruiting, training, and supporting campus leaders. For example, engagement leaders should be active in nominating engaged leaders and support hiring decisions related to engagement. In addition, engagement leaders could help onboard a new dean or senior leader relative to the campus work on engagement. One leader shared an example of providing a 60 day plan of “new dean” introductions to key community leaders, and then serving as a key resource for that person moving forward. In addition, participants suggested finding avenues to help faculty/staff construct how engaged work can help them achieve their own objectives and fulfill their interests.

7) Be attuned to structural/systemic challenges and opportunities

Engagement leaders discussed the importance of structural/systemic challenges and opportunities that can promote or inhibit engagement. Participants suggested that many networks related to engagement are informal, and that some important people in administrative roles may not gain access to important information. Thus, leaders must be attuned to how these networks might limit the flow of knowledge across the institution. Some leaders discussed the importance of having an Engagement Council that can share information across units involved with engagement. Policies should be in place to help people successfully participate in their roles on the council. The discussion about structures and systemic issues also crossed over into the area of community involvement. Participants talked about creating porous, welcoming boundaries for community partners to get involved. Examples included paying attention to parking and attitudes in welcoming visitors to campus. In this conversation, one leader declared that “engagement is about access, not control.” Finally, participants discussed the challenges of managing scaled impact of engaged work across the university and community. Some emphasized that engagement leaders should convene these spaces, but not take credit for successful outcomes. One leader pointed out that scaled, systemic action often relates to

promoting social and economic transformation in the community or region. He asked, “Are we disrupting the status quo or sustaining it?”

Personal Professional Action Plan

Regarding the support and recognition for the faculty, first they want to build a community of practices and scholarship. For instance, some people suggest that set out an amount of money to identify faculty who are doing community engagement. Second, they should get support from provosts to develop a month professional development training to educate committed to this work and who are interested in doing this work.

Regarding the community to the people in the community, attendees suggest develop communication plans to send message to different groups of audience. One says that he/she will meet the president speech writer in person and help the president on how to communicate with audience. Presidents should be educated about the importance of the community engagement. Since, most of the offices have social media outside of the office, they can also take advantage of the social media to reach more people. To do this, they can hire graduate students to use social media. Before posting any information, students should know the importance and the meaning of community engagement.

Looking to the Future: Shaping a National Discourse

We should bring what we are doing to the public. Community engagement plan should be easily read and understood by everyone. At the same time, we should present ideas to the president so that they can put the engagement in the spotlight at the meetings.

Regarding the differences among the community engagement groups, the personal professional development may be more important than the institutional development. When we cultivate individuals, we share values and recognitions with them. Professional development may include learning methods, personal ability of addressing issues, skill development, as well as building capacity of leaders. To influence the engagement/outreach agenda nationally, it is important to prepare people for the future roles as provosts and presidents. Building associations of the professions.

There is an issue on how to do storytelling. How to bring others on board? How to disseminate information? We are not getting better on getting trust from the public. We should identify the problems locally and nationally and focus on the outcomes and how we solve the problems in higher institutions.

Building the Network: Planning the Next Convening

Topics: (1) Examples of funding models; (2) advantages and disadvantages of decentralization (or other organizational structures); what does it look like when the engagement becomes institutionalized (where are we going and whether we are working toward the right direction, what would be different?) (3) what assessments are being used by different institutions, and how to measure impact? (4) What does the legislator want to hear and who make decisions; (5) how to develop professional development as chief administrators (how to work in a leadership role); (6) political issues by community engagement; (7) examples of how

to make presentations of work across the university and its landscape; (8) What are some sticky problems that community are facing and talk about the work and resources tackling these issues; (9) the diversity of the strategies used by different universities.

Speakers/Presenters: Invite presidents from some universities to talk about presidential leaderships so that we can learn more about the perspectives of presidents. Or representatives from big foundations.

Format: (1) Workshops in specific aspects; (2) a panel of presidents; (3) discussion on case studies (how to work effectively) so that others get help from peers; (4) create the space for difficult conversations (e.g., presentation about how to delivering information); (5) small group discussion (e.g., brainstorming and break up into small groups talking about urgent problems and problem solving, and people can move around and search for help from different groups).