

Planning and evaluation: reviewing ATS Standard 2

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Planning and evaluation may not top the list of favorite activities for faculty, staff, administrators, and board members but instead of approaching these tasks with dread or fear, curiosity might be a more helpful posture. Purposeful and well-structured planning and evaluation, when viewed as support of the pursuit of mission and in service of students, need not be daunting and may even bring delight via the affirmation of competencies and the discovery of moving forward in new ways.

Planning and evaluation take place in light of a school's mission and these activities are part of the institutional integrity to which a school is called (see [reflections on Standard 1: Mission and Integrity](#)). Planning prompts a school to designate the necessary steps and activities to achieve a school's mission. Evaluation engages reflection on whether those steps and activities have been effective—produced the desired outcomes. Together, planning and evaluation “focus on the health of both schools and the individual degree programs they offer” (Preamble to the *Standards of Accreditation*).

The Preamble to Standard 2 asserts: “Theological schools are communities of faith and learning guided by institutional visions that inform thoughtful planning grounded in ongoing evaluation. Planning is a mission-guided and broad-based process that focuses on strategic priorities



in light of current realities, resulting in a plan that is appropriately resourced, actively implemented, regularly reviewed, and periodically updated. Evaluation is a simple, systematic, and sustained process that helps schools understand how well they are achieving their missions and then helps schools use that information to better achieve their missions, especially regarding student learning and formation.”

Standard 2 guides schools both in institutional and educational planning and evaluation. Standard 2 addresses student learning and formation, and the institution as a whole. Standard 2 encourages schools to be curious:

- Given our mission, what are our goals?
- Who do we need to hear from to plan well?
- What is most important in pursuit of our mission?
- With a plan in place, who will do what? When? What resources will be needed?

- Are graduates formed and equipped in the ways we hope they will be? Will they serve well?
- What do we need to pay attention to? What might need to change?
- How can evaluation help affirm and maintain our strengths?

Planning is mission guided and broad based

Planning is anchored in a school's mission and seeks input from a wide range of internal and external stakeholders. The most effective strategic plans are widely owned because their development, including the designation of priorities within the plan, is generated with input from many constituents. Schools can use processes of planning and evaluation to foster engagement and share wisdom among constituents. Surveys, focus groups, and open conversation feed strong planning alongside institutional and industry data.

Planning focuses on strategic priorities considering current realities

A global pandemic, new institutional partnerships and mergers, or the receipt of significant outside funding, for example, might necessitate a reconsideration of strategic priorities or how goals are pursued. Be attentive and realistic.

A plan is appropriately resourced and actively implemented

A plan that exists on paper but is not acted upon does not serve a school well. To be realistic and actively implemented, plans need to be supported by the allocation of human, financial, and temporal resources. Think about how to define and track the resources that will lead to successful implementation.

Plans are regularly reviewed and periodically updated

Plans that are too rigid will not serve a school well, so plans benefit from frequent assessment. Given rapid change in higher education and the church, some schools have opted for shorter planning timelines, with strategic goals updated or adjusted annually and rarely spanning the decades-long timeline more common in the past. Don't be afraid to tweak or reconfigure the plan when needed.

Evaluation is a simple, systematic, and sustained process

Though all theological schools seek both qualitative and quantitative evidence that they are meeting their institutional and educational goals, planning and evaluation processes must fit the mission, ethos, and available resources of a school to be sustainable. Planning at a freestanding school will take a different shape than a school embedded within a university system with which it must coordinate. The assessment of program learning outcomes for degree programs will be structured differently with a faculty of four and a faculty of 40. Don't make things too complicated or onerous.

To help demystify planning and evaluation, the [*Self-Study Ideas*](#) offer insight about how schools might engage each element of Standard 2. For example:

- A school might demonstrate its engagement with this statement by evaluating whether its strategic plan is clear and specific for all appropriate stakeholders to understand... (Self-Study Ideas for Standard 2.3)

What are you seeking to do as a theological institution?

How are you going to do it?

What will tell you if you've made progress toward your goals?

- A school might demonstrate its engagement with this standard by describing how the school's most recent strategic plan was engaged after it was adopted... (Self-Study Ideas for Standard 2.4)
- A school should demonstrate its engagement with this standard by describing its overall understanding of the role of evaluation in the life of the school... (Self-Study Ideas for Standard 2.5)

comprehensive overview of the philosophy, process, and practices of institutional evaluation.

Thoughtful planning and ongoing evaluation do not call for perfection, but rather the commitment to curiosity about how well schools are achieving their missions and serving their constituents. Go forth. Be curious. Observe. Learn. Delight in good work. Adjust as needed. Serve faithfully and well!

In addition to the *Self-Study Ideas*, *A Reflective Guide to Effective Evaluation for Theological Schools* offers a



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