ATS Design Lab introduces strategic assessment model through iterative design

By Debbie Creamer and Michael Hemenway

We've all heard about the importance of strategic planning: charting an intentional course forward based on a careful consideration of our missions, contexts, priorities, limits, and possibilities. Far less attention is given to strategic assessment—where we ask how well we are doing something, how we could do it better, or whether we should be doing the thing at all.

While planning is important, assessment lets us explore and learn from the past and present as part of imagining and living into the future. Good planning and implementation help drive each other, but strategic assessment adds a third essential component that interacts with and propels them both. Done well, it makes planning more realistic, implementation more effective, and the whole process more engaging and meaningful.

Strategic assessment is important because it helps us look more closely at what we have done and are doing, drawing on an attitude of learning and curiosity, not just at what we hope to do. It also reminds us that we never start with a "clean slate" and that—whether we intend to or not—we are always confined by, resourced by, and responding to what we have done before and to what the current situation offers us. Rather than ignoring these influences, strategic assessment leans into them with intention and openness.

From design thinking, we call this an iterative process— one that breaks down large tasks into smaller ones that can be reflected on, repeated, and refined throughout the planning, implementation, and assessment lifecycle.
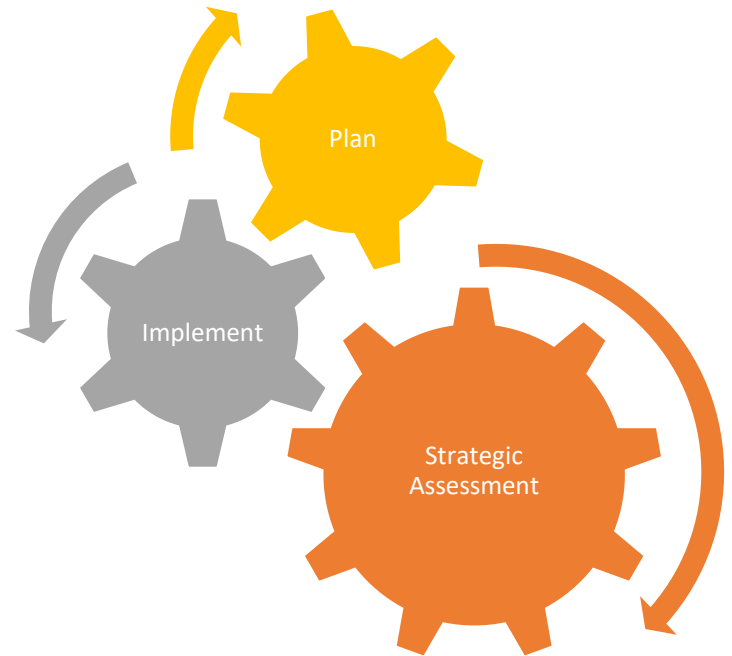
This iterative approach to assessment provides more agile and adaptive implementation and planning through regular reflection on how our plans fit our values.

We use the word "assessment" here to intentionally differentiate from the comprehensive work of "evaluation" as described in the new ATS *Standards of Accreditation* as well as from the work sometimes done by offices of institutional effectiveness and evaluation. Those approaches often seek to evaluate the whole; they look at the parts seeing that they help build a picture of the whole.

Strategic assessment, from our perspective, intentionally starts small—and, as such, it is an approach that can be just as useful for debriefing a meeting or class as for charting an institutional direction. It can help with broad work of institutional evaluation, but its value is not limited to large projects, which also means it can be just as meaningful for students and the communities they serve as it is for faculty and administrators.

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1

Similarly, we call this "strategic" assessment to differentiate this intentional iterative process from more informal and intuitive forms of assessment many of us do if we have space, time, and a good conversation partner. The model proposed here provides concrete steps with sustained attention to design principles such as user-centeredness, diversity, curiosity, experimentation, and iteration.

Those of us who have been involved in traditional evaluation and assessment processes know that sometimes these activities are not really doing assessment at all (i.e., they focus on compliance, telling success stories, or making a case for something rather than on humility and learning) or that they focus on assessing things that are easy to review rather than on things

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that matter deeply. Non-strategic assessments are often motivated externally rather than out of a desire to be our best selves and are prescribed by calendars rather than engaged at times of need and possibility. They often don't gather meaningful data, don't reflect adequately on the data that is gathered, and don't act on what they learn. In these and many other ways, a shift to strategic assessment is sorely needed.

A model for strategic assessment

The ATS Design Lab has been developing a model of strategic assessment to help member schools with projects large or small. In it, we draw heavily on principles and practices of iterative design that identify concrete problems or challenges and then design activities that specifically address these problems. Our model is a flexible process, not a recipe, so it takes some practice and requires some adaptation to fit each specific context.

In the spirit of iterative design, we encourage users to pilot this process initially on a small project, such as an event you are planning, a degree change you are implementing, or a course you are designing. As your teams practice this process, you will begin to build the intuitions

and capacities to expand strategic assessment to larger institutional contexts. Remember, this is an iterative design approach, so keep tasks small to allow for timely reflection and refining.

1 Identify your goals (for the assessment—not the project!)

As with implementation and planning, if we do not have a clear sense of our goals for assessment, we will not be able to keep the process connected closely to our values. So, as with any design, strategic assessment begins with clearly articulating your goals for assessment. Why are you investing time and effort in assessing this project and what are you hoping to learn from the process? Often, these goals for assessment will connect to furthering the goals of the project itself, but they are not the same. Examples of goals for strategic assessment might include to decide whether to continue a project or not, to better align a project's goals or outcomes with changes in your communities or context, or to provide a better experience for your users the next time you offer an event.

2 Create instruments and activities

Once you have established your goals for assessment, consider what activities or instruments you can use to move toward these goals. You might begin by framing your goal in the form of questions (either one single question, or a series of interrelated and smaller questions). For example, deciding whether to continue a project might be framed as "if we never did X again, would anyone miss it?" and subsequent questions might include who would miss it, why would they miss it, how much would they miss it, what parts of it would they miss, whether other opportunities meet those same needs, and whether (and how much) all of this matters to your mission.

Once you have a clearer sense of the questions you are trying to answer, you can begin to identify the sorts

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2

of instruments or activities that will lead you toward answers (or, sometimes, to better questions). Do you need a cost/benefit or ROI analysis? Do you need to gather input from participants or stakeholders? Do you need to attend to historic inequalities or implicit bias? Do you need to look closely at the goals of the project in light of shifts in institutional priorities and values? Will you use surveys or town hall meetings? Do you need to schedule some workshops with the finance teams at your institution? Are there other sorts of experiments you need to run? What lenses or perspectives are you missing? Remember that the desire here is not just to "gather opinions" or "make a case" but rather to explore—with curiosity and openness—in ways that help you learn, understand, and (eventually) act in response to the questions you have generated.

3 Interpret and visualize/synthesize data

Data is an important part of the strategic assessment process, yet often our relationships with data in assessment are less robust than we would hope for. At this stage of our iterative strategic assessment process, we begin thinking about three relationships with data. First, as you consider the activities designed to help you accomplish your stated goals for assessment, what existing data and resources do you need to gather in support of these activities? Second, what new data do you need to collect and how will your activities and instruments afford this collection? Third, how will you aggregate and store these data to support the coming phases of analysis in the strategic assessment process?

It is also essential to remember that data does not speak for itself. Every data point and its connection to another can tell multiple stories. So, our next task in strategic assessment is to carefully interpret the data we have gathered in light of our assessment goals. Curiosity and diversity of perspective are paramount in this interpretive phase. Play with the data, put different bits in conversation with others and see what emerges. Ask hard questions of the data, particularly with your assessment goals in mind. Build visualizations of your data that tell a story from different perspectives and through different connections among the data.

4 Making decisions: what's next?

At this point, we are ready to ask questions again. What are the stories of the data suggesting? What now shall we do? What will we start doing, what will we stop doing, and what will we change?

As we get to this stage, it is helpful to think in two directions (or two lobes, as visualized below). One direction looks at what we learned from the *outcome* of this strategic assessment project to identify next steps. If your goal was to decide whether to continue a project, the next steps might be to affirm its value and keep it on the schedule, cancel it altogether, put it on hiatus for a year, run a modified program next time (an experiment), or reframe the question and start the assessment process again. But the second direction is equally important: what did we learn from the *process* and what should we change the next time we engage in strategic assessment? In some ways, this is the infamous "assess the assessment plan"—was the plan as effective and as useful as you hoped it would be? We suggest that you also reflect on whether or how this strategic assessment process translates to other areas of work, noting that what you learn from the process of assessing a degree program might help you (or others) engage in the process of assessing a budget or an initiative or a mission statement. In other words, what did this process of assessment teach us about ourselves and our work together more broadly?

What did we learn from the *outcome*; what are our next steps based on what we learned from this work?

What did we learn from the *process*; what should we change the next time we engage in strategic assessment?

Because this is an iterative design process, the work never actually ends; we are constantly involved in this cycle of revisit, reflect, and refine. And so, whenever we come to the point of realizing an outcome or implementing an action, we also want to start planning for and initiating the next loop of the iterative process, which then leads us into another round of experiments, instruments, data, and decisions.

Putting it into action

This model of strategic assessment through iterative design can be helpful when looking at activities or projects at periodic intervals or decision points (as with our example of whether or not to continue a program). We also recommend this process be included in less-intuitive moments, such as the design or launch of grant projects or new programs.

Thinking about strategic assessment from the very beginning of an activity allows it to be interwoven with project design and implementation in ways that simplify and enhance the work of assessment (for example, by setting up processes for data collection and analysis from the start). And, as we noted earlier, strategic assessment can help make planning more realistic, implementation more effective, and the whole process more engaging and meaningful.

If you're interested in learning more about this model of strategic assessment through iterative design or would like help implementing this process at your school, you can email Debbie Creamer, ATS Design Lab director.

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At ATS, we know that we do our best work when we are learning in community . . . a community of schools. We also know that a majority of ATS schools have recently applied for grants as part of the Lilly Endowment's Pathways for Tomorrow project, which focus on institutional assessment and strategic planning. We believe this concept of strategic assessment could be helpful to schools as they engage in this work. The ATS Design Lab can support your efforts by helping you increase your capacity for design thinking and strategic assessment in ways that align with and enhance your institution's goals and outcomes. If you are interested in speaking to the ATS Design Lab, please email its director, Debbie Creamer, who can share how strategic assessment and the Design Lab can help you imagine or implement this model in your own setting.

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4