

Developing Self-Study Themes through Large-Scale Engagement at the University of Wisconsin-Madison

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In less than three months, we engaged over six thousand campus and alumni constituents at the University of Wisconsin-Madison (UW-Madison) to identify self-study themes for 2009 reaccreditation. This process combined technology with personal contact to identify values, visions, and contemporary issues of the university. Inclusiveness and transparency were key elements of our approach. The engagement process may be used effectively in strategic planning, reaccreditation, and other situations where broad-scale campus input is coupled with meaningful dialogue in a short time frame.

The Context

The University of Wisconsin-Madison is a Big Ten land-grant university with over forty-one thousand students and twenty thousand faculty and staff members. For the past two decades, the campus has used institutional reaccreditation as an opportunity for strategic planning. The reaccreditation process of 1989 yielded a document, *Future Directions*, that served as the first campus-wide strategic plan. As part of the 1989 self-study, more than five hundred individuals (faculty members, staff members, students, and community members) participated in the self-study process through campus-wide discussion. The 1999 reaccreditation process, documented in *New Directions* (1999), led to the second campus-wide strategic plan titled *Connecting Ideas* (2001). In total, sixty individuals participated in the 1999 reaccreditation teams that developed the foundation for the next campus-wide strategic plan, while over two hundred were engaged in the process through consultation with the teams. Both reaccreditation self-studies—1989 and 1999—focused on strategic planning as their special emphasis.

In the spring of 2007, the provost initiated the University of Wisconsin-Madison's 2009 reaccreditation by appointing leaders and a core reaccreditation team. While the reaccreditation and strategic planning processes have been successful over the last twenty years, we wanted to build on that success to expand the inclusiveness and transparency. Advancements in technology and engagement methodologies fueled our ability to scale our approaches to engage thousands, rather than hundreds. In addition, we recreated our self-study structure to cross academic divisional lines, which greatly enhanced our ability to generate innovative solutions to cross-cutting issues.

In February 2007, reaccreditation leaders chose to broadly and visibly engage the campus community in identifying the themes for the institution's self-study. They initiated this process by first asking two key umbrella questions to set the tone for the entire reaccreditation self-study: "What will it mean to be a great public university in a changing world?" and "How will the University of Wisconsin-Madison uniquely embody this greatness?"

The Campus-wide Engagement

An ad hoc group consisting of the core reaccreditation team and key campus administrators with process or public engagement expertise met in March 2007. They were faced with the question of how to interact with thousands of faculty members, staff members, and students as well as nearly 363,000 alumni living around the world. They considered a variety of public engagement approaches and explored the pros and cons and time requirements of each. The aim of the large-scale campus engagement was to identify multiple themes that would then be explored in depth by self-study theme teams with the overall goal of creating a vision for the future of UW-Madison as a great public university.

A campus-wide engagement approach was designed, combining a number of components from public engagement approaches at both the national and international scale (Coleman and Gøtz 2002; Lukensmeyer and Brigham 2005). This approach used two basic methods to reach the campus community: a Web-based survey tool and in-person meetings with existing advisory and governance groups on campus. Three survey questions, based on an appreciative inquiry approach (Hammond 1998), were identified within the context of the umbrella questions to initiate the discussions and solicit input for the identification of the self-study themes:

1. What about UW-Madison do you most value and want to carry forward?
2. Ours is a changing world. In our changing world, what are issues for UW-Madison to address?
3. What will define UW-Madison as a great public university in the future?

While the questions were being developed and validated, the survey process and software for both the data collection and the data analysis were developed. The group considered options including outsourcing for the surveys and data analysis and using on-campus resources with commercially available software packages. The decision was made to use an on-campus, online survey system developed by the Office of Human Resource Development (OHRD). The group members agreed that once the data were collected, the reaccreditation steering committee would analyze them using a custom-designed software tool to search, sort, and cluster them as needed.

The Web-based survey began with an e-mail message from the provost to all faculty, academic staff, and classified staff members, using the OHRD survey system, inviting participation in the reaccreditation process. Undergraduate, graduate, and professional students each received an e-mailed survey as well. At the same time, the Wisconsin Alumni Association sent the same survey to 138,000 alumni. In total, over 193,000 surveys were e-mailed locally and around the globe, with over a 3 percent total response rate (Table 1). In addition to the Web-based approach, over fifty campus governance and advisory groups were visited, in person, by the reaccreditation director or deputy director within a four-week period in April and May 2007. A simple process was followed at these meetings, wherein participants first wrote their answers to the three questions in a silent brainstorm and then discussed them as a group. A transcript of the discussion that followed was created and entered, along with all worksheet responses, into the OHRD online system after each of the meetings. In addition to the governance group meetings, seven campus-wide listening sessions were held, targeting faculty and staff members by disciplinary area. Finally, several sessions were scheduled for second and third shift employees, during their shifts, with Spanish and Hmong translators.

Table 1. Constituent Responses (Number and Percentage) and Percent of Each Group Responding to the 2009 UW-Madison Reaccreditation Self-Study Survey

Constituent Groups	Number and Percentage of Responses		Percentage of the Constituent Group Responding
	Number	Percentage	
Students	3,337	54%	8.0%
Alumni	2,211	35%	1.6%
Faculty members, faculty staff governance and advisory groups	454	7%	21.9%*
Academic staff members	145	2%	2.4%
Classified staff members	82	1%	1.6%
Total responses	6,229	99%	

*Approximately 20 percent of the faculty responded to surveys.

Utilizing Themeseekr to Identify Themes

The twenty-five-member reaccreditation steering committee met for two full days in June to begin a process of sorting almost 13,000 responses to two of the three questions into themes (18,687 responses in total). Using Themeseekr,¹ a software tool developed by a graduate student at UW-Madison to help sort, categorize, and analyze the survey responses, the steering committee began with a calibration exercise using a random sample of 200 responses to one survey question. Members worked in small groups to identify emerging themes. The groups then discussed the themes they had identified, using professional facilitation, to ensure a consistent sorting and classification process.

Once the primary emerging themes were identified, each member of the 25 member steering committee worked at a computer using the Themeseekr software to categorize the remaining responses. This process of carefully reading responses and grouping them into the appropriate themes took about ten hours in total and was invaluable in helping the team members understand the concerns and values that ultimately emerged. At the end of this process, twenty-two themes were identified.

The initial twenty-two themes were then vetted with constituent and leadership groups that included the deans' Leadership Council, campus executive leaders (the chancellor, provost, and vice-chancellor for administration, vice provosts, and provost's Executive Group), vice-chancellor for administration's directors, Board of Directors for the Wisconsin Alumni Association, student government, and the reaccreditation steering committee. These groups further aggregated the themes into a smaller number of integrated themes.

The steering committee met again in July 2007 to review the integrated theme models. Through facilitated discussion, the committee developed the following six overarching themes condensed from the twenty-two initial themes:

1. Rethinking the public research university
2. Integrating the processes of discovery and learning
3. Creating an impact and shaping the global agenda
4. Preparing global citizens and leaders of the future
5. Building a welcoming, respectful, and empowered UW-Madison community
6. Institutional integrity: being a responsible and sustainable public institution

True to the transparent and inclusive nature of the process, the six themes were once again taken back to the groups involved in the initial consolidation. When the themes had been finally vetted, plans were made to identify and invite faculty and staff members to serve as cochairs of the six theme teams. Each team is composed of faculty members; academic and classified staff members; graduate and undergraduate students and alumni; and community members representing diverse communities. Almost half of the chairs are also members of the steering committee and were involved in the identification of the six themes. In total, 190 faculty members, staff members, students, and alumni serve on the six teams. Their assignment during the fall of 2007 was to host further discussion and/or data collection around their assigned theme and respond to specific questions created from the initial process. All teams were also directed to discuss their thematic topics in terms of key cross-cutting questions about distinctiveness, vision, climate, and diversity and infrastructure as well (see <http://www.greatu.wisc.edu/themes/>).

At the time of the Higher Learning Commission Annual Meeting in 2008, these teams will have submitted their reports with their visions for the future of UW-Madison. It will be the responsibility of the core reaccreditation team to develop the final self-study document that will contain the team reports and a section addressing the Criteria for Accreditation. Later this spring, campus leaders will begin drafting the next campus-wide strategic plan. Emerging ideas from the six self-study theme reports will serve as starting points for developing campus-wide strategic planning priorities. The broad reaccreditation engagement process, with 190 members of the teams and over 6,000 participants in surveys and discussions, has heightened expectations and excitement about this second phase of the campus strategic planning process. Most important, the process has been transparent and inclusive to help ensure that the resulting strategic initiatives reflect visions and priorities for the entire campus community.

Key Successes

The reaccreditation team succeeded in securing meaningful, large-scale engagement within a scant three months. Several strategies have proven to be exceptionally helpful, including:

- A commitment to ensuring that the processes were transparent, inclusive, and iterative
- Use of professional, process-oriented leadership during the planning phase and professional facilitators for large-group meetings
- Web-delivered survey system that allowed for large numbers of responses to be solicited and collected
- Themeseekr software that displayed the data in various ways and facilitated rapid analysis of responses by constituent groups
- Analysis of the responses by all the steering committee members rather than by a few people or an outside group
- An extensive communication campaign including a Web site (<http://www.greatu.wisc.edu/>), personal invitations from the chancellor and provost, and articles in campus newspapers

Note

¹ Themeseekr was developed by Erik Andrejko. For more information about this software, contact Erik at andrejko@themeseekr.com.

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