

Action Research to Support the Sustainability of Strategic Planning

Action research examines real-life events to understand and shape future organization action.

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Background

In the summer of 2007, a new president took leadership of Philadelphia University. The incoming president followed a long-term predecessor who had led the institution through a significant transition from a narrowly focused curriculum for predominantly commuter students to a broad-based, professional curriculum serving 3,600 undergraduate and graduate students in architecture, business, design, engineering, allied health, science, and textiles majors on a primarily residential campus.

The new president, an economist whose practice, teaching, and research field is entrepreneurship, seemed a natural fit for an institution that has reinvented itself several times over its 125-year history. In deciding to come to Philadelphia University, the new president was particularly captivated by the institution's past trajectory and by the still untapped growth opportunities he believed were present "in the DNA" of the university.

Immediately upon arrival, the president launched a 12-month strategic planning process. By all accounts, the process was highly participatory, comprehensive, fast, and challenging. The planning process was both well thought-out and carefully structured. Faculty and staff alike felt that the president allowed the plan to emerge organically from the work of many committees and subcommittees with strong faculty leadership. During the planning process, the president encouraged a higher-level perspective, integrative thinking, and the blending of historical institutional strengths with

Figure 1 **Institutional Characteristics: Everyday Trade-Offs®**

	←	More						More	→	
	1	2	3	4	5	6	7	8	9	
Long Term										Short Term
Risk Taking										Risk Averse
Cooperative										Compartmental
Measure Inputs										Measure Outputs
Autocratic										Participative
Self Sufficient										Seek Advice
The Individual										The Team
Open Communication										Need-to-Know
Planful										Ad Hoc
Externally Focused										Internally Focused
Reward Performance										Reward Commitment
Intuitive										Analytical
Efficient										Effective
Remuneration										Recognition
The University										The School/Department
Quality										Quantity
Innovative										Conservative
Impact to Us										Service to Others

Source: Michael A. Diamond, Academic Leadership Associates, LLC

emerging opportunities. The charge was to focus on the needs of 21st-century professionals and how to prepare these professionals to be leaders in their fields. The president posed questions along the way to encourage a grander, less detailed vision. As he said, "I'm not looking for a 'get better' plan; I am looking for a transformative plan."

Near the beginning of the planning process, external consultants facilitated a day-long workshop with committee

and subcommittee chairs. The workshop was designed to explore external trends in higher education and to challenge participants to think beyond their current knowledge of the environment. Participants also were asked to complete an "everyday trade-offs" exercise (figure 1) to raise their awareness of the characteristics of institutional culture that had shaped the university going into the strategic planning process and that might shape the vision of the university

coming out of the process. These characteristics included variables such as predominant communication patterns, decision-making processes, external versus internal orientation, risk inclination, and level of collaborative versus silo behavior.

Participants were asked to rate these characteristics as they would expect to see them in an “ideal” institution and then to re-rate them as currently perceived at their institution. Surfacing gaps between ideal and current institutional characteristics was helpful in preparing for the planning process and would prove helpful again during the implementation phase.

Strategic Plan Formulated

Toward the end of the planning process, committee chairs, deans, key faculty, and administrators gathered for a two-day retreat to review the recommendations of the committees. Having first reconfirmed the institutional mission statement, the emergent plan built on the institution’s tradition of preparing graduates for professional work and responded to the clear desire to center the institution on student learning characterized by engagement, collaboration, and connection to the real world and infused with a liberal arts curriculum that carried throughout a student’s coursework.

In addition, while sifting through input from professionals in the university’s fields of study, a new theme emerged. Increasingly, the innovative edge of professional work requires integrated ways of thinking attainable only when people know how to use expertise from fields other than their own and are comfortable working in teams that cross domains. Practicing professionals repeatedly suggested that innovation grows from more integrative thinking than traditional academic preparation fosters. To prepare graduates to be at the center of innovation, they would need—as the core ingredient of their professional grounding—to be learning in the same way they would eventually be working: in multidisciplinary teams, thinking across boundaries.

As the recommendations of the planning committees emerged during the two-day retreat, the president posed what would become his seminal questions. Given his background in entrepreneurship, the questions were not unanticipated: “What is the value proposition of Philadelphia University? What qualities inherent here, or nascent here, will fuel a clear and powerful identity for this university in the world of professional education in the 21st century?”

Based on ideas gleaned over the first months of his presidency through many conversations on campus and then tested with external audiences, he proposed the formation of a new college of design, engineering, and commerce. Not only would pedagogical approaches across the university be revised to optimize collaboration, engagement, student-centered learning, and cross-disciplinary courses, but also a formal, integrated curriculum among all majors within the schools of design, engineering, and business would be developed to provide students with formal cross-disciplinary experience from their freshman year onward. The integrated curriculum would be housed in a new college of design, engineering, and commerce that would include majors previously based in separate schools. Because an undergraduate curriculum integrating business, engineering, and design majors through four years of study did not currently exist at any other college or university, the proposal was transformational.

Eckel and Kezar (2003) identify seven structural “markers” of transformative change, including changes to the curriculum, changes in pedagogies, changes in student learning and assessment practices, changes in policies, changes in budgets, new departments and institutional structures, and new decision-making structures. The 2008 strategic plan for Philadelphia University, fully implemented, meets these criteria. The vision for the university depended on significant and sustainable change that would not require a few leaders to remain in place, but instead would become institutionalized over time, altering culture, values, and campus perceptions of the differentiated role Philadelphia University plays in shaping students for their professional lives. Faculty, administrators, and staff would be “making new sense” (Kezar and Eckel 2002, p. 314) of the institution throughout the implementation process, not necessarily knowing how mental models of the organization and understanding of its institutional identity might emerge.

Organizational Change, Organizational Learning, and Sustainability

Organizational change theories and practices have been used in corporate settings, government entities, and social service agencies for many decades under a variety of names. More recently, they have been applied in higher education. Several recent books have described higher education institutions undergoing significant change (Clark 1998; Eckel and Kezar 2003; Hartley 2002; Keller 2004).

These studies provide invaluable guidance for any institution in a similar situation. In particular, Eckel and Kezar's (2003) *Taking the Reins: Institutional Transformation in Higher Education* offers a wealth of valuable information on change processes in higher education based on their five-year study of 23 institutions through a longitudinal project with the American Council on Education. Boyce (2003) provides a review of the literature on organizational change in colleges and universities and notes that as a particular kind of organization—"loosely coupled systems with diffused decision making as well as goal ambiguity"—institutions of higher education have features that "shape the change process and suggest particular strategies for change" (p. 120).

Organizational learning is central to the sustainability of change.

Building on the work of Senge (1990) and Argyris and Schön (1996), others conclude that organizational learning is central to the sustainability of change in colleges and universities (Boyce 2003; Brown 1997; Eckel and Kezar 2003; Kezar 2005). Chaffee and Jacobson (1997) observe that it is necessary to develop a culture that values organizational learning and continuous improvement. As one faculty member put it early in the implementation of the plan, "One would think learning would be a natural part of an institution of higher learning, but the notion of continuous improvement sometimes seems to have passed by academia."

Most of the time, the development and implementation of a strategic plan are considered time-limited projects rather than ongoing processes. However, as Boyce (2003) states in her conclusion:

The literature demonstrates that organizational change and organizational learning are inextricably linked. The challenge of successful change is less planning and implementing and more developing and sustaining new ways of seeing, deciding, and acting. Successful change is about learning enough collectively so that institutional consequences, outcomes, and inquiry change. Sustaining change in higher education is dependent upon sustaining the conditions of learning in an institution.

In short, those in higher education committed to successful institutional change should be rigorous in inquiry, skillful in dialogue, and fearless in examining the institution in the context of its environment. (p. 133)

Action Research to Support Plan Implementation

During the implementation of the new strategic plan at Philadelphia University, "action research" was used to complement the measurement of goal achievement by traditional quantitative methods in order to support success, increase the potential for sustainability, and move the institution toward a learning orientation. Anderson (2005, p. 45) states, "as Birnbaum (1988) notes, 'organizations can only respond to stimuli that they are designed to monitor; therefore, organizations must have sensors, or methods for detection of important information'."

Boyce asks:

How then, is institutional change sustained? The larger body of organizational change literature suggests specific practices for sustaining change that can be applied to higher education. These practices are inquiry and dialogue; continuously utilizing action learning and institutionalizing and embedding changes in the structures, systems, and cultures of the institution. (p. 130)

Action research examines real-life events to understand and shape future organizational action.

Action research emerged in the first half of the 20th century from the work of Kurt Lewin (see, for example, Lewin 1946), who believed that knowledge could be created from real-life situations in order to both form theory and shape future organizational behavior. Since then, many subfields have emerged based on Lewin's early work. Whether known as action inquiry (Torbert and Taylor 2008), action science (Argyris 1999), utilization-focused evaluation (Patton 2008), practitioner research (Bensimon et al. 2004), or participatory research, the broader field of action research

offers methods for examining real-life events as they unfold in order to understand and shape future organizational action. Herr and Anderson (2005) and Anderson, Herr, and Nihlen (1994) provide helpful discussions of many forms of action research and its philosophical roots and applications.

For the purposes of Philadelphia University, action research is defined as a process in which a researcher/facilitator, acting as an agent of the organization (Argyris and Schön 1996), involves stakeholders in setting the research agenda and in creating useful knowledge based on assembled data (Antheil and Casper 1986; Patton 2008) to learn more about what is happening in order to more effectively direct subsequent actions. As Argyris (1999) notes, “action research takes its cues—its questions, puzzles, and problems—from the perceptions of practitioners within particular, local practice contexts” (p. 432). Knowledge is then fed back into the organization to help shape behavior in order to optimize organizational success (however that may be defined). Creating knowledge becomes a dialogue between researcher and stakeholders as a shared responsibility; collaboration and responsiveness are key.

Repetitive action research, particularly during times of significant change, establishes a cycle of study-reflection-action, which meets the need for both inquiry and dialogue. During the strategic planning process, institutions typically think about research in the context of environmental scanning, but not necessarily in terms of internal organizational sensing to detect important information about implementation/change processes. As mentioned previously, strategic planning is usually a time-specific project. However, responsive organizations must be planning, implementing, and learning on a continuous basis. Action research is used to enhance the sustainability of change and to help foster an inquiry-based view of organizational learning (Argyris and Schön 1996) going forward.

Implementation of the Philadelphia University Plan

Following trustee approval in the fall of 2008, campus leaders set about implementing the strategic plan. Every organizational unit developed specific goals and objectives related to plan initiatives as well as time lines along which progress toward those goals and objectives would be measured. The collated unit goals provided senior leadership with metrics by which they could assess execution. A variety of activities occurred during the first year, including

ongoing formal and informal communication and work by cross-disciplinary teams on pedagogy and curricula. Two charettes were conducted with faculty from design, engineering, and business in order to experience and reflect upon integrated learning while working on a current, real-world societal challenge such as might be given to students. The charette—a collaborative design exploration format—was a natural option based on its centrality to the university’s architecture and design pedagogies.

At the end of the first year, an action research project was initiated to learn more about how the implementation was proceeding and to support the sustainability of change. The president, provost, and those in charge of planning, communications, and institutional research drew up a brief implementation progress survey to be administered to the campus community regarding understanding of the plan initiatives and assessment of implementation progress. The survey simply listed each of the plan’s initiatives and asked the campus community to assess on a Likert scale (1) the degree to which they understood the initiative and (2) the degree to which they believed the institution was making progress in implementing the initiative.

The results of the survey indicated that perceptions varied widely among different groups of stakeholders, with some expressing satisfaction with and others a high degree of uncertainty about implementation progress and goals. After reviewing the survey data, 14 one-hour follow-up interviews were conducted with the deans of six schools, seven faculty members from three of the six schools, and the dean of students.

Again, the work of Eckel and Kezar (2003) was very helpful during this process. In addition to the seven structural markers of institutional transformation, they also identified five cultural markers of transformation, including “changes in the ways groups and individuals interact with one another,” “changes in the language the campus used to talk about itself,” “changes in the types of conversations,” “old arguments abandoned,” and “new types of relationships with ... longterm stakeholders” (pp. 42–43). These cultural markers helped to shape the questions posed in the interviews (figure 2). The objective of the questions was to learn more about the effectiveness of communication formats, content, and timing, as well as the extent to which people perceived changes in interactions and use of language. Questions also tapped into areas identified in the organizational change literature as important, including level of comfort with the pace of change; degree of sensed

Figure 2 **Dean and Faculty Interview Questionnaire**

Planning Process

1. How were you involved in the planning process?
2. What did you see as your role?
3. What surprised or interested you about the planning process?
4. How was this planning process different from previous planning efforts?
5. How involved in the Plan development were faculty in your School?
6. By what means did your faculty learn of emerging ideas during the planning process?
7. From what source did you receive the most helpful information about the Plan as it was being developed?
8. How was the president involved in the planning process?

The Strategic Plan

9. Did you help shape the resulting Plan?
10. To what extent is the Plan's vision of Philadelphia University a shared vision?
11. What do you see as the top priorities of the Strategic Plan?

Plan Implementation

12. How would you assess progress to date on implementation of the Plan's seven central initiatives?
13. How do you interpret the responses of faculty in your School to the Implementation Progress Survey?
14. How would you describe perception, understanding, and buy-in within your School?
15. What do you feel has facilitated perception/understanding/buy-in?
16. What has blocked perception/understanding/buy-in?
17. What do you believe faculty see as the challenges to successful implementation?
18. To what extent have we built new "common language" around the Strategic Plan initiatives?
19. At this point, how clear to you is the vision of the university that will emerge from the Strategic Plan?
20. Looking out ten years, to what degree, and in what ways, do you believe successful implementation of this Strategic Plan will alter/change Philadelphia University?

shared vision; and development of a common language around the vision, leadership roles, and sense of individual self-efficacy. Those interviewed were asked to reflect on their perceptions of these variables among their peers as well. It is important to mention that campus institutional review board review and informed consent procedures were observed, including full disclosure to interviewees of the intended use of the information. Internal action research relies on transparency about the use of information as an organizational feedback technique as well as clarity on obtaining permission to share any observation that conceivably could be traced to a particular individual or department.

The interviews indicated differences in the perception of and commitment to the implementation process. Some faculty felt that there was significant benefit coming from the implementation process, that the campus community had developed a new common language around the initiatives, and that they had a fairly clear vision that the university would be a significantly different and stronger institution as a result. Others were both unsure of and concerned about the implications of the implementation of a new curriculum and pedagogy. Some were particularly apprehensive about the availability of required expertise and faculty development resources to develop and teach the curriculum.

One of the central points of consensus revealed by the interviews was the critical importance of informal and especially peer-to-peer communication in the social construction of meaning. The interviews indicated that faculty in the schools of design, engineering, and business were much focused on the administrative structure of the new college and that ambiguity regarding the structure was blocking forward motion. Certain faculty who would be outside the new college expressed concern that their disciplines might now somehow recede in importance.

A summary of central themes revealed by the survey and follow-up interviews was shared with the provost's council (which includes all the deans who were interviewed) as well as with the president and vice presidents. The reflective discussions in these group meetings and in individual meetings were critical to understanding the data. It was extremely helpful to have the information put into context and to share insights based on a variety of experiences with and knowledge of the organization from multiple perspectives.

Reviewing the research together, the president, provost, deans, and senior administrators made some significant midcourse corrections to the implementation process. Both the president and provost expressed that they personally had a high tolerance for ambiguity and had believed that the structure of the new college should emerge via the curriculum development process—that is, as a result of the ongoing curricular integration, with form following function. But feedback from stakeholders indicated the need for clarity regarding the structure early on so that they could have a sense of the administrative integration; understand their identity in the new structure; and reconcile leadership, evaluation, reward, and governance implications.

As implementation moved forward through 2010, more opportunities for informal dialogue were created. Deans and other senior administrators were encouraged to put implementation progress on every school faculty and departmental meeting agenda and to provide clear, consistent messages about implementation activities. Updates were provided at every community forum and faculty meeting. Faculty presented examples of new collaborative learning projects. The structure of the new college was announced ahead of schedule, with leadership roles clarified. In the two weeks following the announcement, the president and provost met with 18 small groups of faculty who responded to invitations to offer feedback and talk further about the implications of the new structure. As a result of feedback on the importance of interaction and

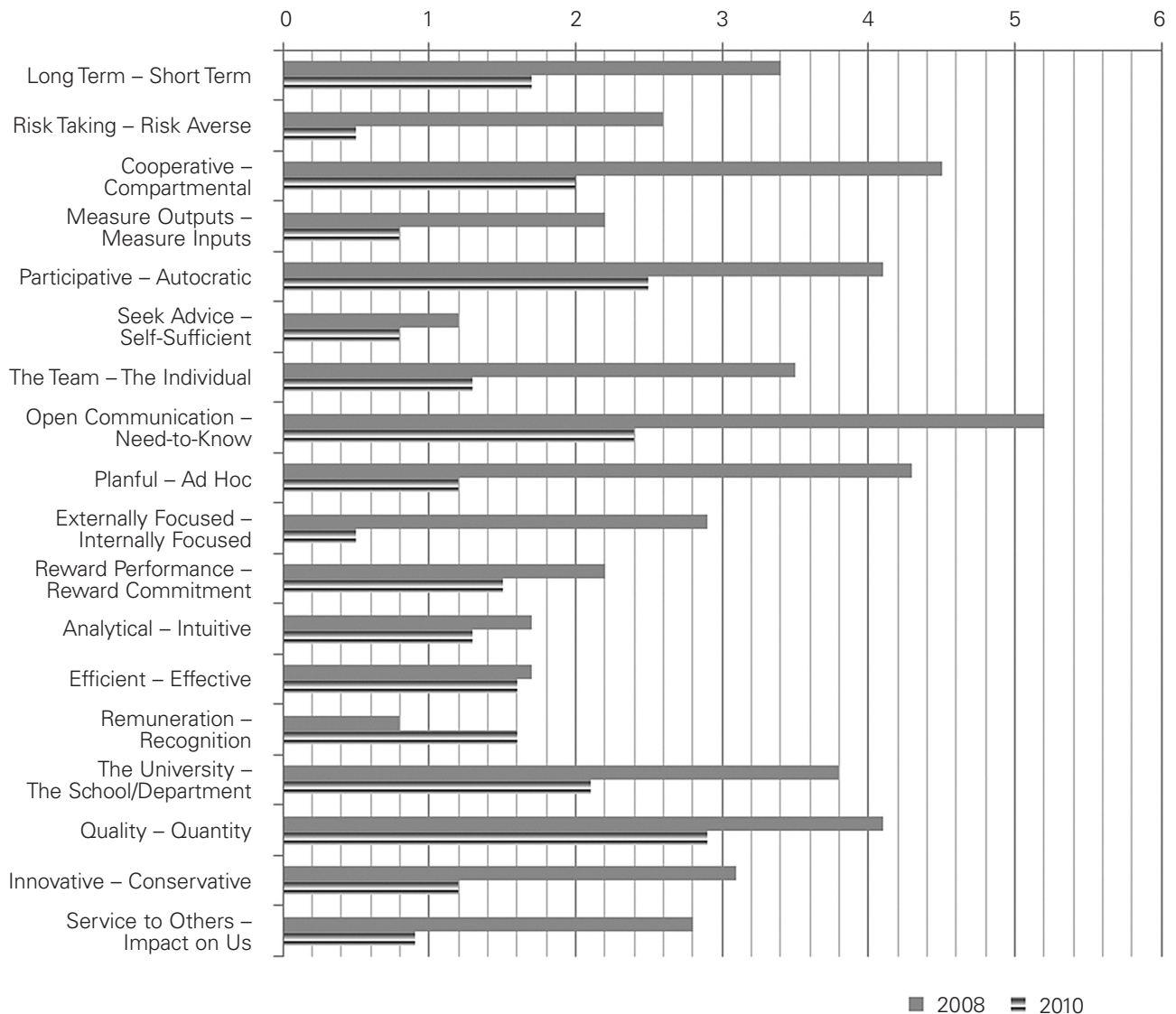
communication, more “collision spaces” were created in which all members of the campus could interconnect their questions and ideas. An unused space on campus became a “nerve center” where those leading the design of the new curriculum put their work on hundreds of Post-it® notes across the walls for others to examine, discuss, negotiate, and reconfigure. Less visible and definable were shifts in the president's thinking about plan implementation as a change process that could be monitored and shaped to increase clarity and participation and to make use of the desire for intellectual engagement around change. Action research informed the president's decision making in a number of areas, but most specifically relating to communication, perception, participation, and leadership roles.

At the end of the 2009–10 academic year, the implementation progress survey was readministered to the entire campus community. This second survey indicated greater understanding of implementation activities and, more importantly, much more consistent awareness across academic units. Additionally, the faculty and administrators who had attended the planning workshop in 2008 were asked to complete the everyday trade-offs exercise once again, rating institutional characteristics first as they would see them in an ideal institution and then again as currently perceived in their institution. The ideal ratings were quite stable over the period. However, there was a reduction in the gaps between the ideal and current ratings two years into implementation process as compared to the gaps reported in 2008 (figure 3). In particular, on all but one characteristic, there was movement toward the ideal. Although not traditional quantitative measures, information from both these activities indicated that the campus community perceived significant progress with implementation, increased openness of communication, and increased understanding of the transformed institution.

Conclusion and Summary

This article suggests that developing a strategic plan, even through a highly participative and data-driven process, is not sufficient to sustain change if implementation of the plan is not monitored as an organizational change event. To the degree that a strategic plan is institutionally transformative, monitoring change during implementation becomes even more important. It is only as the plan is implemented, as people start to change their language, their mental models, and their perceptions of what this particular university is

Figure 3 **Comparing the Decrease in Gaps to “Ideal” Institutional Characteristics Before and After Strategic Plan Implementation**



Survey source: Michael A. Diamond, Academic Leadership Associates, LLC

and will be in its distinctiveness, that we can say the change is actual and sustainable.

To optimize the understanding of process issues during plan implementation and in support of more traditional goal assessment, the following steps are recommended:

- Identify a research facilitator—someone with experience with qualitative, local methods who has access to senior administration and a level of trust with campus leaders.

- With the participation of campus stakeholders, select areas of information that would, if available, guide ongoing implementation activities to optimize success. These might include communication sources and formats, level of campus understanding and buy-in, constraints (real or perceptual), and the degree to which individuals within the institution are participating in and assimilating change.

- Collect information through surveys, interviews, or other qualitative methods that will provide insight into perceptions of ongoing change by campus segment.
- Explore how the organization is experiencing change through feedback of key findings and reflective dialogue among stakeholders.
- Identify additional actions and activities to address concerns, pace, communication, and unanticipated effects that can be shaped to support plan implementation, organizational change, and organizational learning.

It is only as people start to change their language and perceptions that we can say change is sustainable.

It makes good sense to use knowledge about organizational change and organizational learning during planning and implementation processes. Action research—co-designed by and shared with stakeholders—triggers conversations that help to better align campus perceptions and expectations regarding the pace of change and the impact of the strategic plan on organizational structures, roles, and individual competencies. Action research provides opportunities for faculty and administrators to employ systems thinking and to observe how larger issues of culture, values, and communication are supporting and/or hindering strategic plan implementation.

Moving toward a learning orientation as an organization requires time, a variety of intentional activities, and leadership at many levels of the institution. Action research is an important capacity-building tool in this journey. By employing action research during implementation of the university strategic plan, a roadmap takes shape for monitoring transformative change and sustainability as well as ongoing organizational vitality and resilience. 🌱

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