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Measuring Scholarly Outreach at Michigan State University: Definition, Challenges, Tools

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Abstract

At Michigan State University (MSU) we have developed and are testing a faculty survey instrument to gather institution-wide information on outreach activity. We have sought to define consistent quantitative measures that can be used both to describe the whole institution's investment of resources in engagement activities and to establish expectations of what individuals and units should contribute to meeting the institution's outreach or engagement mission. In this article we first discuss MSU's definition of outreach/engagement as a form of scholarship and the conceptual and political issues that arise in determining what activities should be counted. Second, we explain some impediments experienced in creating an appropriate survey instrument and some general barriers to collecting data on outreach activities. Third, we describe the data collection strategy. Finally, we discuss the online survey tool itself and the types of quantitative data we seek.

Introduction

As recognition grows that outreach and engagement[1] are significant aspects of a university's responsibility, universities must document their overall performance and that of academic units and faculty in outreach efforts. Such documentation will be useful in several ways:

- as a means of assessing an institution's overall enactment of its engagement/public service mission;
- as a management and planning tool for ensuring that individual academic units contribute appropriately to the institution's overall engagement commitment;

[1]At Michigan State University we chose to identify this area of activity as "outreach—in a deliberate attempt to distinguish it from "public service," "service," or "extension"—but we could just as well have called it "engagement." In this article we use the terms interchangeably.

- as a basis for "telling the engagement story" to the institutions' publics;
- as a new rubric for comparing peer institutions nationally.

Current discussions about outreach's growth and potential impact rest primarily on descriptions and assessments of individual projects or groups of like projects. Although they provide valuable insights, they do not persuasively demonstrate institution-wide commitment to or achievement in outreach. The documentation must, at least in part, be quantitative, so that comparisons among units or among institutions are not based solely on anecdotal claims.

At Michigan State University (MSU) we have developed and are testing a faculty survey instrument to gather institution-wide information on outreach activity. We have sought to define consistent quantitative measures that can be used both to describe the whole institution's investment of resources in engagement activities and to establish expectations of what individuals and units should contribute to meeting the institution's outreach or engagement mission. After a decade of championing outreach, MSU's leaders are demanding outreach productivity measures to help guide them in the management of faculty time and other resources.

In this article we discuss, first, MSU's definition of outreach/engagement as a form of scholarship and the conceptual and political issues that arise in determining what activities should be counted. Second, we explain some impediments experienced in creating an appropriate survey instrument and some general barriers to collecting data on outreach activities. Third, we describe the data collection strategy. Finally, we discuss the online survey tool itself and the types of quantitative data we seek.

Definition of Outreach/Engagement at Michigan State University

MSU defines outreach as activity in which academic staff engage with external organizations and communities in a reciprocal learning/teaching situation that increases both the external partners' capacity to address issues and the academic staff's capacity to produce scholarship that better reflects the realities outside the laboratory or the library. Relying heavily on Boyer's *(1990)* work on redefining scholarship, a 1993 faculty committee formally defined outreach as "a form of scholarship that cuts across teaching, research, and service. It involves generating, transmitting, applying, and preserving knowledge for the direct benefit of external audiences in ways that are consistent with university and unit missions." *(Provost's Committee on University Outreach 1993, 1).* A subsequent committee defined the dimensions of quality outreach and produced an evaluation and planning guide *(Committee on Evaluating Quality Outreach 2000).*

There are two traditional ways of accounting for a university's outreach accomplishments: through reviewing *individual* faculty reports on their service activities, and through aggregating *institutional* expenditures on "public service." Neither method serves an institution that seeks to tie outreach to scholarship. First, the units of analysis are activities that are separate from teaching and research rather than integral to scholarly activities—whether under the heading of research, teaching, or service—that are designed to help communities address their pressing issues. Further, these methods group under the rubric of "service" many activities that are not outreach, such as service to one's institution, service to one's discipline or profession, and community service activities in which the faculty member participates as a citizen but not as a scholarly expert.

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At the *individual* level, "service" is one of the three mission areas ("teaching" and "research" are the others) into which faculty group their activities in annual reports or in promotion documents. Unfortunately, faculty use the service category to report all activities that are not clearly traditional classroom teaching, student advising, and library or laboratory research. It has become a catchall of unrelated activities, where one reports service to one's college along with service in the community, and anything else that cannot be claimed in the "more important" categories of "research" and "teaching." Since Michigan State does not define "service" and "outreach" as synonymous, the current system of faculty reporting obscures the scope of the university's outreach commitment.

At the *institutional* level, the attempts at collecting data on outreach activity through the Integrated Postsecondary Education Data System (IPEDS) are no more successful in illuminating outreach activity. That reporting system characterizes an institution's commitment to public service based on its "service" expenditures, both in dollars and as a percentage of the institution's overall budget. This measure, we think, produces a misleadingly simplistic approach to assessing outreach commitment. To respond to IPEDS, Michigan State scours its table of accounts and assigns to "public service" all those that have an academic element but do not appear to fit under "research," "instruction," or "academic support." This category includes accounts set up to receive and expend client payments—clinical services, largely. It also includes accounts explicitly established to receive outside funds for delivering service—cooperative extension is the major element, but public broadcasting and dozens of small endowments to support such things as a refuge for battered students and staff or the cyclotron director's discretionary fund are also listed. However, the outreach or engagement activity located at the heart of the academic institution is not included. The activities of the psychology professor who helps to design more effective channels of communication among a community's social service agencies or of the education professor advising the state board of education are not tabulated. The three people who provide support to service-learning across the campus are included in MSU's IPEDS report, but the community work of forty or so faculty and the nearly 1,500 students in their service-learning classes are not. The medical school's practice plan earnings appear but not its intervention to lower the incidence of heart disease in an African-American community. Because these engagement activities are not separately budgeted, they do not appear in the accounting system.

We believe an accurate picture of an institution's commitment to serving society will be achieved only when it measures outreach and engagement activities that are integral to the research and teaching work of the faculty. Since such activities do not normally appear as separately assigned or budgeted activities, we must make special effort to identify indicators within the core of academic work.

Impediments and Barriers

When trying to assess outreach activity, two major issues are especially troubling, particularly the intertwining of outreach in research and teaching. The first issue is developing a common rubric of measurement for quite different activities. Outreach occurs in nearly all institutions of higher education and in most academic units within them, but it does not occur in discrete, comparable units. That is, most of the activities that fall under the rubric of engagement or outreach do not give rise to comparable "transactions" that parallel the "credit hours offered" or "kinds of degrees awarded" or "research monies received" that we use to represent teaching and research. Finding the common scale or measure that will allow us to compare a finance professor's giving a talk to the local Kiwanis club to a professor and her class's work with a community to redesign the town's waterfront is daunting.

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A second issue is the difficulty of encouraging faculty to supply the information on which measures of institutional performance rest. Lack of compliance, of course, bedevils all foci of institutional research, but it is exacerbated in an area whose definitions remain somewhat murky and contested and where there is no clear relationship between activities reported and rewards granted.

First, many faculty have difficulty seeing how the definition (and more especially the shorthand phrase distilled from it—"outreach as scholarship") relates to their academic work. Broadening the definition of scholarship, as Boyer and others have suggested, seems to make more sense to scholars in the disciplinary traditions of the social and behavioral sciences than it does to those in the traditions of physical, biological, and engineering sciences. Many find the concept of simultaneous research and outreach or teaching and outreach difficult to comprehend and apply to their work. Used to categorizing their work into discrete sections, they resist seeing that some of it should be counted in more than one section. Others react in just the opposite way and contend that everything they do should count as outreach.

Second, because outreach activity is so varied, we have to ask for more information on each activity in order to classify and quantify it—ten questions rather than two or three. Because the rewards—salary increments or promotion or even collegial respect—are not as clear for outreach accomplishments as they are for research (and to some degree teaching), faculty do not see much benefit in keeping track of and reporting on their outreach work. Faculty see little evidence that the university's public commitment to serving society through outreach results in higher recognition for those who spend considerable time and effort working with groups and communities external to the campus.

Data Collection Strategy

As our first step in developing a data collection strategy, we asked a group of about twenty-five faculty to identify and define the distinct types of faculty outreach work. The group's year-long exploration resulted in five types or categories: outreach instruction, outreach research, clinical service, student experiential/service learning, and public events and information. This classification scheme was developed with two—sometimes conflicting—goals. On the one hand, we wanted a list sufficiently comprehensive that faculty in all roles and in all departments could understand how their work did and/or could contribute to Michigan State's outreach effort. On the other hand, we wanted to craft definitions that restricted the activities to be counted to those that related to scholarly work and that employed the disciplinary expertise of the faculty participants. Because of this tension, it is worth reviewing the definitions in some depth.

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Outreach instruction includes off-campus and online credit and noncredit instructional programs that are specially designed and marketed to serve external students who are neither campus degree seekers nor the institution's staff. Instruction targeted at other academics and noncredit courses targeted at campus staff are excluded. We are using participant hours—that is, a CEU-like seat-time measure that can be aggregated across varied instructional formats—to measure noncredit instruction.

Outreach research includes applied research, capacity building, evaluation studies, policy analysis, technical assistance, and technology transfer. Such activities are considered outreach when they are conducted in collaboration or partnership with schools, health organizations, nonprofit organizations, businesses, industries, government agencies, and other external constituents. Best practice involves sharing goals, expertise, and resources; it results in mutually identified benefits including scholarship by faculty engaged in the partnerships. This category is meant to include those projects in which faculty use their expertise to interact with external groups on a continuous basis in a reciprocal relationship in which the faculty member is both learning and teaching.

Clinical service includes all client/patient services—human and animal—provided by university faculty through unit-sponsored group practice or as part of their clinical instruction, and by medical and graduate students as part of their professional education.

Student experiential/service learning includes faculty activities in supervising or directing civic or community service performed by students. The category includes traditional course-based service-learning, career-related internships or practica, and students volunteering in the community if faculty are involved. The experiences should be carefully integrated with the student's academic experience and should incorporate frequent, structured, and disciplined reflection on the linkages between the civic/service activity and the content of the academic experience. How strictly to interpret "service" in this category was a difficult question. Students choosing to serve, either as volunteers or as part of a class, often have dual objectives—to serve society, and to learn more about career choices and build résumés. Thus, we found it difficult to determine when an activity moved from our service-learning category into a "career preparation" category. The faculty committee raised such questions as, Should we include in this category tutoring in K–12 schools that is part of a teacher preparation program, or interning with a government agency that caps the pre-law preparation program? Rather than restrict the category, we chose to give the faculty all three options—academic service-learning, career-related service, and volunteerism—though we are most interested in the data from the first option.

Public events and information counts university resources that are developed and maintained through scholarly activity and made accessible to the public. Resources for the public may include managed learning environments (museums, libraries, gardens, galleries), virtual environments (Web sites, public broadcasting), educational materials and products, and short-term learning events (such as expositions, exhibits, demonstrations, and fairs). Activities in this category are mostly learner-directed in that learners usually visit or participate on their own, decide when and how long to visit or participate, and choose which of the available interpretive materials to use. For activities in this category, the application of scholarship and the experience of the external audience are widely separate in time and/or space. This category is meant to include only those performances, exhibits, pamphlets, and so on, for which faculty and academic staff were significantly involved in the design of those events or artifacts.

What characterizes the activities we seek to count (and does not characterize those we mean to exclude) is their "discretionary" nature. They represent decisions by individual faculty members (and thus, indirectly, by the institution) to invest resources (i.e., faculty time) that could be used elsewhere, in order to fulfill the university's commitment to its outreach mission. Basic to all of the activities is the fact that they are less "efficient" than traditional methods. Although engagement activities surely enhance the learning, teaching, and research of participants, the activities tend to be labor intensive and have uncertain outcomes. Incorporating a service-learning experience in a course takes more faculty or staff time than a standard lecture-discussion format, time that is no longer available for preparing a grant application or advising students. However fruitful working with a community to address, say, the issue of youth violence may be for the researcher, the process of collaboration is, by definition, much more time consuming and unpredictable than conducting research in the library or the laboratory. Thus the college or university that decides to share the resources that mark it as a unique institution—its academic expertise—with the community is making a resource allocation decision. It is the evidence of those decisions that we seek to measure.

The Outreach Measurement Instrument

Keeping in mind the definitions, categories, and possible barriers, we developed and tested a Web-based survey instrument to collect data on faculty outreach activity. The Michigan State University Outreach Measurement Instrument (OMI) is divided into three sections. The first two sections require mostly quantitative data; the third section encourages respondents to describe in some detail their overall outreach work or some aspect of it.

The first section of the survey comprises a single question—total percentage of time spent on outreach work during the reporting year. In order to capture the sense that outreach is generally integrated with faculty research, teaching, and service, we acknowledge that this is a duplicative measure. The survey instructs respondents to count "all work that has an outreach component, including that portion of your teaching, research, and service that is conducted for the direct and immediate benefit of audiences external to the academy." This same question is asked of faculty when they complete their annual "effort reports." After they have divided 100 percent of their time among teaching, advising, new course development, research, consulting, university service, and general service, they are asked to estimate what part of that 100 percent effort included an outreach component. As faculty time is the university's most valuable resource, determining how much of that time involves faculty in engagement with the external community is, we believe, the best single measure of institutional commitment to outreach.

The second section asks respondents to characterize the outreach activities or projects on which they spent the most time. The responses allow us to categorize outreach activity along several dimensions and thus contribute to better assessment and management of outreach as a campus-wide activity. The dimensions include:

- area of concern
- type of activity
- partners or groups involved
- location
- revenues

The primary dimension is "area of concern." Faculty are asked to choose one or two areas from a twelve-item menu that includes such areas as community and economic development, public safety and corrections, or preK–12 education. Although some faculty's outreach activities touch on many different social issues, we ask them to limit their selections to no more than two of the areas of concern. Most, we expect, will choose the two on which they spend the most time, but they can report on any aspect of their activities even though it was not the most time consuming. We then ask what percentage of their outreach effort they devoted to each area of concern. Examination of the distribution of faculty time across the areas of concern allows us to judge whether individual faculty outreach efforts aggregate into an appropriate spread over the areas of concern—to ensure that efforts aimed at strengthening preK–12 education are not leading to relative neglect of economic development, for example.

"Although engagement activities surely enhance the learning, teaching, and research of participants, the activities tend to be labor intensive and have uncertain outcomes."

The remainder of the second section probes further into their work in the one or two identified areas. For each chosen area of concern, we ask whether their work has a particularly international or urban focus, where the work took place (on a menu ranging from specific Michigan counties to global), and what type of outreach work (outreach instruction, clinical service, etc.) they are doing.

These responses reveal where and on what types of outreach university resources are being spent. Is instruction appropriately balanced with outreach research or clinical service, both in general and in specific areas of concern or location? How well is the university fulfilling its obligations to serve citizens in all parts of the state and to contributing to capacity building on a regional, national, and international basis?

> *"We are particularly interested in obtaining a sense of the outcomes of their outreach work . . . and in discovering whether any formal evaluation of the project occurred."*

The second section then asks faculty to characterize their collaborators in the external community by choosing one of eighteen groups from a menu (educators, business and industry managers, labor advocacy and employment support personnel, etc.). While this section's first question—on "area of concern"—identifies the target of their outreach work, the second focuses on their collaborators. Thus a faculty member's work may target improvement in scientific understanding among the state's K–12 students, but she might collaborate directly with some students, or with teachers, or with the association of school boards, or with state policymakers.

The second section of the survey concludes by asking for the number of people who attended or participated in the outreach work and for estimates of external funds (gifts, grants, contracts, or tuition revenue) coming to Michigan State to support the outreach activity and of external funds their outreach work helped generate for external collaborators. Earlier versions of the survey sought more detailed financial information, particularly estimates of resources that the university and external partners contributed to the outreach work; however, we found that faculty either resented such a heavy emphasis on monetizing activity that they consider socially rather than economically driven, or were unable to estimate the costs of carrying on the activity. Thus, in the absence of detailed financial data, we rely on faculty time involved in outreach work as the primary measure of the university's investment in outreach.

The third section of the survey asks those faculty willing to do so to give more detailed descriptions of their outreach work or some aspect of it. In piloting earlier versions of this survey, we encountered an insistent demand for qualitative evaluation from some faculty who contended that efforts to quantify the outreach effort ignored, even suppressed, what is unique and important about outreach. Section three provides an opportunity for faculty to describe the importance of their work. A series of prompts ask them to describe the actions they took, for whom, with which collaborators (internal and external), and about what issue or problem. They are asked to specify how long the project has been under way and what plans, if any, there are for sustaining it, since the length of time a collaborative project is sustained is a good measure of outreach success. We are particularly interested in obtaining a sense of the outcomes of their outreach work—occurring both in the external community and in their own teaching or research—and in discovering whether any formal evaluation of the project occurred.

We do not expect to incorporate the data collected from this third section into the management analysis. Rather, we see the information gathered here as a rich storehouse of examples of how faculty expertise contributes to strengthening people's capacity to achieve their goals. We plan to use this information as the basis for stories for the news media, for our president's speeches and conversations across the state, for communication with the legislature and the alumni, and, perhaps most important, for communication to the faculty and staff about how their university enacts its outreach mission and how they might participate. We do not know how many faculty will avail themselves of the opportunity to give us this detail, but we expect that those who do will be the ones most involved in outreach and whose projects are most worthy of publicity.

Conclusion

Our data collection goal is to amass a rich array of information that we can use in a number of different ways. First, we will use the data as a management tool. We can examine changes in an academic unit's portfolio of outreach projects over time and survey the institution's overall portfolio of projects. Such information can be used in the planning and resource allocation process. Second, faculty documentation of outreach activities better enables us to count outreach in the allocation of "rewards" to faculty and units. Third, the information can be used as a major communication and publicity tool. Finally, we hope that what we learn can help provide a more accurate classification and definition of outreach/engagement for national forms of data collection and reporting.

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About the Authors

• Robert L. Church has given leadership and voice to the numerous measurement issues in higher education, particularly concerning outreach, service, and engagement. He is an advocate for finding means to embed such measures in the data related to the teaching and research missions of the academy rather than simply measuring "public service" and to finding equivalent measures for outreach that attest to its scholarly nature. He holds a Ph.D. from Harvard University in the history of American civilization.

• Diane L. Zimmerman, as director of outreach administration and advancement, provides leadership to the working team at Michigan State University (MSU) that is developing and field testing the measurement tools described in this article. She has been involved with the ongoing conversations and development of publications related to evaluating and measuring scholarly outreach over the last decade at MSU. In addition, she works with Institutional Research to incorporate outreach measures in the university-wide data collection systems. She holds a Ph.D. in educational administration from Michigan State University.

• Burton A. Bargerstock, assistant director of outreach research and technology, is a participant in the conversations about measurement and development of the measurement tool, provides the technology expertise for field testing the data collection tool, is assisting in analysis of the quantitative data, and explores other system-wide outreach data possibilities with personnel in Institutional Research. He is a doctoral candidate in educational administration from Michigan State University.

• Patricia A. Kenney, researcher and writer, provides expertise in interview protocol design and interviewing, has been involved in the development of the field test and its implementation and in analysis of the qualitative data. She holds a Ph.D. in educational administration from Michigan State University.