Strategic planning tools for educational developers supporting SoTL cultures and programs at their institutions

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Abstract

As centers for teaching and learning increasingly offer support and leadership for the scholarship of teaching and learning (SoTL) at their institutions, educational developers need better tools to plan their SoTL programming. This article shares the work of a regional network of educational developers across six institutions in Virginia, who aimed to enhance SoTL offerings within and across their institutions. While SoTL tools and models for individual instructors proliferate, this community of practice noted a gap in support for developers doing more institution-level planning. Through their collaboration, they developed two tools for planning and launching institution-level SoTL programs: the SoTL Strategic Planning Worksheet and the SoTL Program Taxonomy. This article describes the development of these tools and assesses their implications for educational development practice.

Keywords: scholarship of teaching and learning, strategic planning, educational development programming, program design

Centers for teaching and learning (CTLs) and educational developers have been identified as important middle agents between top-down

and grassroots efforts in establishing or developing cultures of producing scholarship of teaching and learning (SoTL) at institutions (Schwartz & Haynie, 2013; Simmons & Taylor, 2019). While there are numerous resources for instructors on how to do SoTL (e.g., Chick, 2018; Kirschner et al., 2021) and conceptual models for educational developers to think about SoTL (e.g., Chen, 2021; Cruz et al., 2019), there are fewer practical tools for designing and implementing programming to support faculty engaging in SoTL work. The tools and practical examples that do exist tend to be focused on evaluating the efficacy of a single program rather than on strategic program design (e.g., Frake-Mistak et al., 2020). This article seeks to expand the educational developer's toolbox by sharing two SoTL planning tools developed through an iterative design process by a regional educational developers' community of practice (Lukes et al., 2023).

The two SoTL planning tools, a SoTL Strategic Planning Worksheet and a SoTL Program Taxonomy, were designed to support individuals or CTLs to engage in a strategic planning process for selecting and implementing institution-wide SoTL initiatives. Educational developers from different institution types and with varying levels of SoTL experience can use these tools to imagine and implement SoTL programming in purposeful and context-driven ways. This article reviews existing SoTL models, describes how the two SoTL planning tools presented differ from and contribute to educational development, provides evidence of tool efficacy, and shares implications and future directions for their use in educational developer practice.

The Need for SoTL Planning Tools

As practitioners, educational developers have limited resources and need to make strategic choices in selecting SoTL program models to adapt for their institutional needs. Rather than reinvent processes, practitioners can benefit from the "maps" other institutions have created for understanding their instructors' SoTL work and considering

alternative models based on what other institutions are doing or have tried. Educational developers therefore need to understand both the SoTL process for supporting faculty and methods of SoTL support at varying scales for their own efforts. Developers also need practical tools for planning and implementing SoTL programming. Our review of SoTL literature for educational developers helped us identify many examples for faculty support and several for institutional change but few practical tools for educational developers. Nonetheless, these larger theories and frameworks helped us conceptualize the purpose and value of SoTL for individuals and for institutions writ large, and we summarize these findings below.

Educational developers and scholars have explored various approaches to conceptualizing how faculty conduct SoTL (e.g., Boyer, 1990; Potter & Kustra, 2011). Taxonomies defining different types of SoTL and SoTL questions abound (e.g., Hutchings, 2000; Nelson, 2003). These taxonomies most frequently explain SoTL practice to instructors and thus serve as resources for developers as they work with faculty on SoTL projects. Educational developers and scholars have also developed numerous theoretical frameworks for helping developers situate SoTL in the academy. For example, Bernstein and Ginsberg's (2009) integrated model of SoTL and faculty development helps developers connect SoTL to a larger context of scholarly teaching practices and recognize their role in supporting these practices (see also Kern et al., 2015). Scholars have offered theories of cultural change, such as Chen's 2021 model, which adapted a multi-level model to build urgency and promote SoTL enculturation. Similarly, several examples use the 4-M framework to understand the levels at which SoTL should be supported (Friberg & Scharff, 2020; see also Kenny et al., 2016). Finally, some literature moves beyond considerations of a single model and emphasizes the importance of campus cultures valuing SoTL scholarship writ large (e.g., Schroeder, 2007; Schwartz & Haynie, 2013). All of these examples describe change efforts or SoTL programming, but they lack practical tools for educational developers to strategically plan and implement SoTL programs.

Myatt et al.'s (2018) work provides one exception. The authors described a three-cycle process through which an international group of developers reflected on their current SoTL programming practices and identified gaps in their institutional SoTL supports. Their cycle is an excellent tool for assessing SoTL support programming at an institutional level. However, once gaps are identified, the authors leave the actual process of planning and implementing new structures and programs to fill those gaps up to educational developers and CTLs. Here we present two tools that support educational developers' SoTL program decision-making and implementation planning.

Development of SoTL Planning Tools

In Fall 2020, the authors formed the SoTL Collaboratory (SoTL-C; https://sotl.gmu.edu/sotl-collaboratory/), a regional, cross-institutional community of practice (CoP) focused on exchanging knowledge about supporting institution-wide SoTL programming. The goal of the SoTL-C was to use this knowledge sharing to strategically plan future SoTL programming at each respective institution while synthesizing and generalizing that information in ways that could be helpful for other educational developers (see Lukes et al., 2023, for details of the SoTL-C model).

To develop the SoTL planning tools, we engaged in a generative, reflective, and ongoing iterative design process (Figure 1). The development began with information gathering by the SoTL-C. We shared the SoTL programs implemented on our campuses and explored CTL websites to identify types of SoTL programming offered at other institutions. Conversations between SoTL-C members as well as memos by the first author helped develop an initial version of the SoTL Strategic Planning Worksheet and a prototype of the SoTL Program Taxonomy.

We initially tested the SoTL Strategic Planning Worksheet (Iteration 1; see Figure 1) internally with the SoTL-C by developing our own strategic plans for SoTL. Based on our experience in practice with the
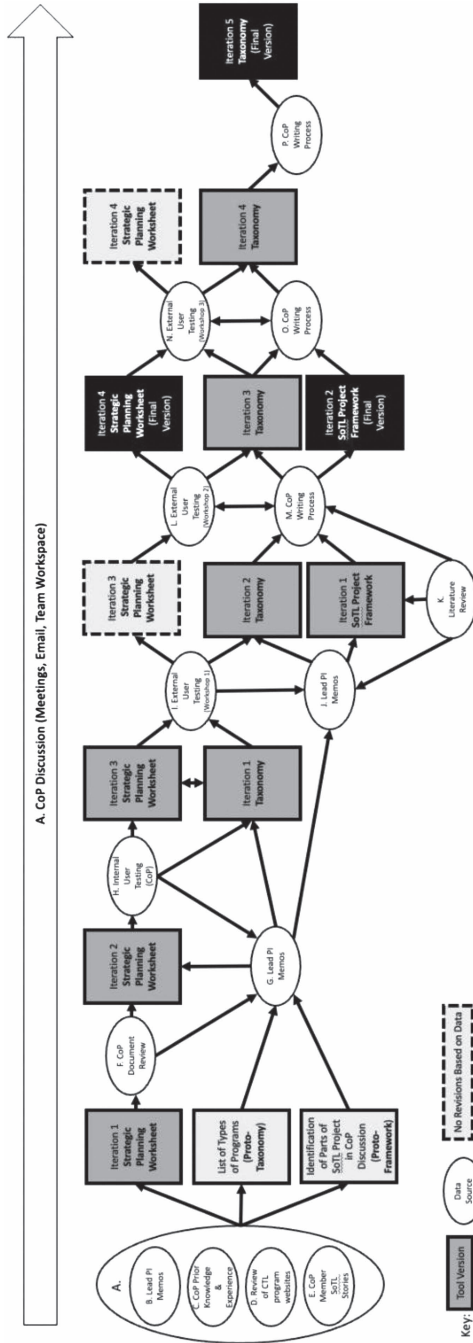
Figure 1. Iterative Design Process for the SoTL Strategic Planning Tools

tool (Iteration 3), we formally developed the SoTL Program Taxonomy (Iteration 1) as a companion tool for the worksheet. After this internal vetting process, we tested each tool with practitioners outside of the SoTL-C during multiple pre-conference workshops that we facilitated through the POD Network in January and October 2021. At this point, while writing and revising based on this external testing, we conducted a literature review and made additional revisions to the SoTL Program Taxonomy inspired by Gravett and Broscheid's (2018) work to outline the models and genres of educational development programming overall. With participant feedback from the previous two workshops and in anticipation of a third pre-conference workshop at the 2022 ICED conference, we developed the final version of the SoTL Strategic Planning Worksheet (Iteration 4; see Appendix A). Feedback from the ICED pre-conference workshop and further internal SoTL-C discussion yielded the final version of the SoTL Program Taxonomy (Iteration 5; see Appendix B). Below we describe each of these tools and their purpose, structure, and limitations, and in subsequent sections we present evidence of efficacy from the POD conference workshops.[1]

SoTL Strategic Planning Worksheet

The SoTL Strategic Planning Worksheet provides a guided reflective process for educational developers to identify and prioritize the SoTL programming they want to implement at their institution in the coming year(s). It is also designed as a tool that can be shared with colleagues for gathering peer feedback on these ideas, aspirations, and plans. Gravett and Broscheid (2018) argued that a program will best support a center's goals if it is designed with intended outcomes in

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1 Because of the limited responses from the ICED 2022 pre-conference workshop, we were unable to include these in our evidence of efficacy. We understand this is a limitation of the tools as we only demonstrate efficacy with a prior version of the tool. However, the changes between the final iterations were relatively minor.

mind. Thus, strategic planning can help developers better align center goals with institutional goals and desired program outcomes.

There are five main sections in the SoTL Strategic Planning Worksheet (Table 1). The overall structure walks educational developers from reflecting on mission and values to dreaming of ideal SoTL programming possibilities and all the way through making next-step decisions and setting the timeline for program development. The tool is intended to balance naming idealistic goals for growing institutional cultures of SoTL and recognizing the practical limits that might constrain an educational developer's efforts. Through this balance, this tool can be useful to developers at any stage of planning for SoTL programming—from those hoping to start the very first SoTL program at their institution (i.e., nascent programming), to those whose CTL offers robust SoTL programming that they would like to revise or supplement (i.e., established programming).

There are three unique elements to the tool that aim to practically support program implementation: recognition of institutional context, acknowledgment of the need for assessment, and attention to resource needs and limitations. First, we recognize that programming is most likely to be successful when it can align with larger university

Table 1. Overview of the SoTL Strategic Planning Worksheet Parts and Example Questions

Section	Purpose	Example question(s)
Part 1: Context	To describe the institutional context that may influence what and how SoTL programs are implemented	What **situational factors** would be important to articulate as they relate to your SoTL programming? What is your **center's or institution's mission**?
Part 2: Current SoTL Programming and Initiatives	To reflect on any current SoTL programs offered at the institution	**Goals –** What do you want participants to know, be able to do, or produce by the end [of the SoTL program]? **Status –** What's working well and why? What could be improved? **Alignment –** How does your SoTL program align with your center's mission? Institution's mission?

(Continued)

Table 1. (Continued)

Section	Purpose	Example question(s)
Part 3: Aspirational SoTL Programming or Initiatives	To think aspirationally about the types of SoTL programs you would like to create	**Program model –** What SoTL Program Taxonomy model does this future program best align with? **Outcomes –** What will you have participants do to accomplish your program goal(s)? **Resources –** What else do you need to consider (e.g., resources, collaborators, stakeholders)?
Part 4: Prioritizing SoTL Programming	To articulate pros and cons for each aspirational SoTL program that will help identify priorities for implementing future SoTL programs	What **resources** does the program require? Do you or your center have **capacity** to support that in the next 1–2 years? How well does this program **align with strategic priorities** for your center and/or institution? What **level of impact** do you seek (e.g., numbers reached, knowledge gained, work produced) as a result of this program? Do you feel the **balance between resources required and anticipated impact** are well matched?
Part 5: Next Steps in Launching New SoTL Programming	To identify concrete plans for implementing 1–2 new SoTL programs in the next 1–2 years	**Program description –** Who is your audience? Why does this program matter? **Assessment –** How will you know you have accomplished your goals or met your desired outcomes for your SoTL program? What evidence will you need to collect? (e.g., surveys, products, interviews, self-reflections) **Timeline –** When do you plan to plan, implement, and assess your efforts?

priorities (Plank & Kalish, 2010). Thus, the SoTL Strategic Planning Worksheet prompts developers to reflect on institutional-level as well as center-level missions and goals throughout the planning process. For example, Part 1 (Context) asks developers to document their center's or institution's mission, and Part 2 (Current SoTL Programming and Initiatives) and Part 3 (Aspirational SoTL Programming or Initiatives) prompt developers to consider the alignment of the program goals with center and/or institutional missions. When prioritizing SoTL programming in Part 4, developers are also encouraged to consider alignment in deciding what aspirational programs to move forward.

Second, in alignment with best practices in program assessment (Plank & Kalish, 2010), we believe that setting intended outcomes for SoTL programming should occur in conjunction with planning for assessing those outcomes. Thus, the SoTL Strategic Planning Worksheet acknowledges the role that assessment plays in planning, implementing, and improving SoTL programming. For example, the tool includes a section in Part 5 (Next Steps in Launching New SoTL Programming) where developers can articulate what evidence they intend to collect for their planned SoTL program(s), who they will collect the evidence from, and when data collection will occur.

Finally, one of the most practical elements of the tool is its attention to resource needs and limitations. The goal of helping developers identify the resources and supports necessary to operationalize their SoTL plans is to enable implementation of a new or revised SoTL program in the next 1 to 2 years. For example, in Part 3 (Aspirational SoTL Programming or Initiatives), developers are asked to reflect on the resources needed for each of the aspirational SoTL programs, including monetary resources, collaborators, and stakeholders that would be important in successfully implementing such a program. Part 4 (Prioritizing SoTL Programming) prompts developers to consider not only the resources for each aspirational program but also whether these resources are available within the next 1 to 2 years and how well balanced the resources and program impact are with each other.

Recommendations for Use

Based on our development, self-assessment, and testing of the SoTL Strategic Planning Worksheet, we have four recommendations for educational developers interested in using this tool:

- **Self-assessment & advocacy.** We recommend using the tool's prompts for individual reflection to help educational developers identify and prioritize the SoTL programming to implement at their

institution. The completed worksheet can then be used as a document to advocate for resources to achieve the identified SoTL programming goals.

- **Peer feedback.** In addition to use as a set of reflective prompts by individual educational developers, we recommend including opportunities for peer feedback. Both within the SoTL-C and during various workshops, peer feedback helped educational developers more clearly articulate their aspirations and more deeply reflect on the details of a planned program. In the final version of the tool, we found doing this peer feedback process after Part 4 (Prioritizing SoTL Programming) was especially valuable.
- **Coupling with the taxonomy.** We recommend using the SoTL Strategic Planning Worksheet in combination with the SoTL Program Taxonomy, described below, as the taxonomy provides a helpful framework for understanding current SoTL offerings (Part 2 of worksheet) and for finding inspiration for future efforts (Part 3 of worksheet). This is particularly important for supporting new educational developers or those new to leading SoTL-specific initiatives.
- **Embracing the aspirational.** While developers may feel challenged by the invitation to put aside logistical constraints during Part 3 (Aspirational SoTL Programming or Initiatives), we encourage educational developers to think big about what SoTL programming they desire. Change making is not possible without aspirational goals, and the later stages of the worksheet are intended to bring some of those ideas back to the foreground.

SoTL Program Taxonomy

The SoTL Program Taxonomy provides a suggested organizing schema and common language for understanding different types of SoTL programming. It is intended to support educational developers' exploration of existing SoTL program models to facilitate adoption or adaptation of existing models, reducing the "reinventing the wheel"

phenomenon. In other words, it is a framework for educational developers to "see" generally what institutions might do to engage and support faculty in SoTL work. We intend the tool to be of value to developers at any stage of program planning. For example, for those working on developing their first SoTL offering, the taxonomy shows the range of possibilities. For those reviewing well-established SoTL programs, the taxonomy supports reflection on programming gaps. In these ways, the SoTL Program Taxonomy is a complementary tool to the SoTL Strategic Planning Worksheet to aid educational developers in designing institution-specific, strategic SoTL programming.

The taxonomy consists of four program categories, derived from Gravett and Broscheid (2018), to help communicate the scope and scale of the 13 different types of SoTL support program models (Table 2). In addition to the program categories and models, the taxonomy includes a description of each model and an example in practice. The examples

Table 2. Overview of SoTL Program Taxonomy Categories and Models

SoTL program category	SoTL program model	Description
On-Demand Project Development Programs	Curated resource collections, self-guided materials, or databases	Access to SoTL resources to help faculty learn about and do SoTL
	"Unprogramming"	Informal discussion—often through social media—and/or Q&A about SoTL with peers
Short-Term or One-Off Project Development Programs	"How to . . . " SoTL informational sessions or workshops	A short event, or series of events, where faculty learn about SoTL
	One-on-one consultations	One-on-one exchange between CTL SoTL expert to help support instructor's SoTL project(s)
Immersive Project Development Programs	SoTL project development institutes	An organized gathering of individuals over a short period of time to make significant progress on developing a SoTL project
	SoTL write-ins or writing retreats	An organized gathering of individuals working on moving SoTL projects toward dissemination

(*Continued*)

Table 2. (Continued)

SoTL program category	SoTL program model	Description
Extended or Ongoing Project Development Programs	SoTL faculty learning community or reading group	An organized gathering of individuals over time (e.g., term) to engage in producing or consuming SoTL
	CTL collaborations	CTL as formal partner in SoTL project
	Train-the-trainer model (faculty or graduate student SoTL Fellows)	A program that trains faculty or graduate students in SoTL methodologies to assist others in their SoTL projects
	Students as Partners in SoTL	A program supporting student partnership as co-inquirers with instructors in SoTL work
Incentive, Recognition & Dissemination Programs	Incentives to develop or complete SoTL project	Financial or staffing incentives to reduce barriers for faculty engaging in SoTL
	Awards or title recognizing faculty engaged in SoTL work	Non-monetary awards and recognition for faculty to acknowledge SoTL work (primarily for tenure & promotion)
	SoTL showcases/ conferences (local dissemination events)	A one-time or annual event where SoTL projects are presented/shared with others

Note. The categories and models are fluid, complementary, and dependent on how educational developers structure and implement their SoTL program models. Examples in practice for each type of program model can be found in the full taxonomy (Appendix B).

especially help to connect the SoTL Program Taxonomy with the SoTL Strategic Planning Worksheet as they offer a glimpse into real-world, context-specific examples of aspirational SoTL programs.

It is important to note that while the SoTL Program Taxonomy organizes SoTL programs into distinct models, SoTL programs in practice often use a combination of models to create an integrated or multi-pronged approach to supporting SoTL. For example, in an Engaged Teacher-Scholar (ETS) program at James Madison University, faculty who do SoTL are selected to join a faculty community in which they are financially supported to make progress on a SoTL project while also learning how to do faculty professional development (see Henry et al., 2021). These elements of the ETS program span four of the 13 SoTL Program Taxonomy models: (1) "incentives to develop or complete

SoTL project," (2) "awards or title recognizing faculty engaged in SoTL work," (3) "SoTL faculty learning community or reading group," and (4) "train-the-trainer model." The SoTL leaders from the ETS program then offer various types of SoTL programming based on the needs and interests of the SoTL leaders, faculty, and departments. These additional SoTL programs spanned additional SoTL models, such as " 'How to' . . . SoTL informational sessions or workshops," "SoTL faculty learning community or reading group," and "one-on-one consultations."

Recommendations for Use

Based on our development, self-assessment, and testing of the SoTL Program Taxonomy, we have four recommendations for educational developers interested in using this tool:

- **Building knowledge & finding inspiration.** For new educational developers or those new to developing SoTL programs, the SoTL Program Taxonomy can support developers' knowledge building. It can be used as a starting point for educational developers across experience levels to conceptualize and find inspiration in the general types of programs others have implemented.
- **Coupling with the worksheet.** As mentioned earlier, the two tools can benefit each other significantly when used together. We recommend using the SoTL Program Taxonomy as a reference tool in combination with the SoTL Strategic Planning Worksheet. We have found it particularly helpful to use the taxonomy alongside the worksheet when reflecting on current programming (Part 2 in worksheet) as a way to identify possible gaps in offerings and when imagining new programming (Part 3 in worksheet) as a way to inspire opportunities developers may not have previously imagined.
- **Sharing with colleagues.** Like the SoTL Strategic Planning Worksheet, the SoTL Program Taxonomy can be used independently as a reflective or sense-making tool. However, we recommend using the taxonomy in conversation with fellow educational developers, and

we have appreciated the additional examples, questions, and inspirations those discussions have raised. Engaging with colleagues and discussing the SoTL categories and models in the SoTL Program Taxonomy can also facilitate additional learning about others' SoTL programs.

• **Stretching the imagination.** The SoTL Program Taxonomy is one approach to organizing different SoTL program models, and we recommend using the tool as a starting point, not as a boundary of what is possible. We understand—and welcome!—that educational developers may have program examples that stretch beyond what is included here. Additionally, as illustrated in the ETS program above, SoTL programs can cross multiple categories and blend multiple models in more integrated ways.

Efficacy of SoTL Planning Tools

As mentioned above, we piloted these tools among members of our CoP (see Lukes et al., 2023) before using them in workshops with other educational developers similarly seeking to strategically develop SoTL program plans. We collected feedback from workshop participants on the tools after each session. After the lead author's Institutional Review Board (IRB) reviewed our work and declared it not human subject research, we proceeded with analyzing our aggregated feedback. We share those results below.

Two virtual offerings of the planning workshop were given at POD's annual conference, one in January 2021 and one in October 2021. Each workshop consisted of two 90-minute sessions spaced two weeks apart. In the first workshop session, participants engaged in two major exercises: indicating where in the SoTL planning process participants were (nascent, emerging, evolving, established) and participating in a virtual gallery walk (using shared slides) exploring an early iteration of the SoTL Program Taxonomy. Between workshops, the participants were asked to complete a SoTL Strategic Planning

Worksheet. In the January workshop series, the authors gave feedback on all the partially or fully completed worksheets; in October, due to facilitator time constraints, this feedback was not provided. For both workshops, in the Day 2 session, participants were placed in breakout groups to peer review one another's strategic planning worksheets. The authors facilitated these breakout groups and provided additional feedback as requested. Participants were asked at the end of the Day 2 session to complete a survey, and all registrants were sent two reminder emails.

Altogether, these workshops included 176 registrants from 139 unique institutions (five of these individuals registered for both workshops), with 102 in total attending across the two workshops (28 in January and 74 in October). Forty-six people (15 in January, 31 in October) provided their feedback, yielding a response rate of 45% for attendees. Overall, participants perceived the tools as valuable. Nearly all of the workshop survey respondents who reported that they participated in the taxonomy activity ($n = 39$) also reported that they found the SoTL Program [Taxonomy] gallery walk activity to be "highly" (74%) or "moderately" (23%) useful (six respondents indicated they did not participate in this activity, and one did not respond). As one participant described learning about the models, "I like the idea of not having to fully reinvent the wheel." Similarly, all survey respondents who reported that they participated in using the SoTL Strategic Planning Worksheet ($n = 44$; one did not use the worksheet, and one did not respond) found the worksheet to be "highly" (70%) or "moderately" (27%) useful, with only one person reporting it was only "minimally useful."

With regard to the peer review activity for the SoTL Strategic Planning Worksheet, the majority of those who participated ($n = 41$) reported it was "highly" (41%) or "moderately" (41%) useful. The remaining reported it to be "minimally useful" (10%) or "not at all useful" (7%). Two of the respondents who reported the worksheet to be "minimally useful" also reported that the peer feedback they received on their worksheets to be "highly" and "moderately" useful, indicating

that while the reflection may not have been useful to them, the worksheet gave them a framework to receive useful peer feedback.

Participants were then asked to indicate how aspects of the workshop and tools were useful to them from a list of options that were "check all that apply" (*n* = 42). A strong majority (81%) reported they "gained new knowledge about SoTL Program models." Two-thirds (67%) reported the workshop and tools "provided a framework for how to organize my SoTL planning." More than half reported this experience gave them "an opportunity to articulate my SoTL program ideas and plans to others" (55%) and "a new perspective on my ideas and plans from peer feedback or comments" (55%). Overall, these responses suggest that the majority of participants found the tools useful, though it is difficult to directly attribute the benefits to a specific tool or to how the tools were utilized in workshop activities.

Of the 46 respondents, the majority reported they strongly agreed (20%) or agreed (50%) that they "made significant progress in completing my SoTL strategic plan for my institution as a result of this program." Nearly all participants strongly agreed (24%) or agreed (65%) that "as a result of participation in this program, I felt more confident in the content of my strategic plan." Similarly, nearly all the participants strongly agreed (26%) or agreed (57%) that "my strategic plan has improved as a result of this program." One respondent reported that "the feedback I received in my plan was so helpful!" suggesting that the peer-peer engagement facilitated by the use of these tools had a positive impact on their strategic planning process.

However, not all open-ended responses were positive. One participant mused:

> I would've appreciated a more scaffolded or tiered approach to participation—whether you're just beginning to brainstorm a program, and then following up once you have more of a concrete plan. It was challenging for peers to give me feedback because I was in a more developing stage than they were.

Such sentiments were also expressed in our own post-workshop debrief discussions, resulting in changes to the SoTL Strategic Planning Worksheet (Iteration 4; see Figure 1) to better invite participants at early or aspirational stages to more effectively use the tool to facilitate conversations with their peers.

Contributions to Educational Development & Future Work

Based on our experiences developing, testing, implementing, and assessing the two SoTL planning tools presented in this article, we have identified three important educational development implications of our work.

First, both the SoTL Strategic Planning Worksheet and the SoTL Program Taxonomy can be used by educational developers with a range of experience levels and positions. For example, the SoTL planning tools can support early career educational developers by increasing awareness of SoTL program types and providing an introduction to the process of strategic planning. More experienced educational developers can also find value in using both SoTL planning tools to characterize the scope of their SoTL programming and consider how the process of strategic SoTL planning could translate to planning of other programs/initiatives. CTL directors may find the SoTL planning tools useful in communicating to leadership the systematic and reflective process for which a SoTL program was developed or, when integrating our recommended opportunities for peer review, in a collective center-wide approach to SoTL strategic planning.

Second, both SoTL planning tools can be used within and across CTLs that are in varying stages of SoTL planning: nascent (no existing programming or plans yet), emerging (initial plans or piloting programs), evolving (tried a few programs and revising), and established (have been offering programming for years, revising, or scaling). The SoTL Strategic Planning Worksheet and SoTL Program Taxonomy in combination provide educational developers across stages of the strategic planning

process a way to systematically assess one's institution's current offerings and prioritizing programming scope and efforts for the future. Furthermore, the SoTL Program Taxonomy could be reorganized according to different dimensions such as time and effort or desired outcomes to assist educational developers in the complex decision-making process of selecting SoTL programs for their CTL portfolios.

Third, both SoTL planning tools have the potential to advance the scholarship of educational development (SoED). By scaffolding the development of a proactive assessment plan, and in conjunction with review by an ethical human subject research board, educational developers may be better prepared to contribute to the literature on what aspects of SoTL programs work, why, for whom, and in what context(s). Furthermore, both SoTL planning tools provide one approach to a common language for educational developers to organize SoTL programs and their assessment plans, which can enable more systematic comparisons of cross-institutional SoTL programming. Such comparisons allow researchers to examine SoTL programs at scale, beyond the case study.

Conclusion

In summary, the SoTL-C used an iterative, evidence-based approach to develop two practical tools for educational developers, the SoTL Strategic Planning Worksheet and the SoTL Program Taxonomy. Through internal and external testing, we believe these tools provide added value for educational developers who are leading, or plan to lead, SoTL programs on their campuses. As scholars and practitioners increasingly recognize the importance of both studying teaching practices in higher education and applying that learning to pedagogy (McMurtrie, 2022), educational developers will play a key role in advancing these practices. Without planned and strategic support, SoTL risks a continued future of dismissal and under-engagement (McMurtrie, 2022). We hope the tools presented in this article will offer educational developers strategies for affecting systemic and cultural transformation in support of SoTL.

Biographies

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Conflict of Interest Statement

The authors are not aware of any conflicts of interest.

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Appendix A: SoTL Strategic Planning Worksheet

Document Audience and Purpose:

The purpose of this document is to guide faculty developers or other administrators, who are tasked with leading scholarship of teaching and learning (SoTL) initiatives or programming that aim to engage/support faculty in SoTL work at their institution of higher education, to reflect on their own or their institution's past SoTL programming leadership experience(s); think through the details of their aspirational and future plans in the context of their current institution; and provide a venue to receive peer feedback on specific aspects of their SoTL strategic plans.

Part 1. Context

Part 1 is intended to help you articulate your context and how you think about SoTL.

What **situational factors** would be important to articulate as they relate to your SoTL programming? (e.g., your role(s), your unit(s), institutional context)

What is your **center's or institution's mission**?

How do you define **scholarship of teaching and learning (SoTL)** for the purposes of your strategic planning?

Resources for SoTL definitions-Overview of literature: https://sotl.illinoisstate.edu/downloads/definingSoTL.pdf

Part 2. Current SoTL Programming and Initiatives

Part 2 is intended to help you start reflecting on where you are now and what you are currently doing to support SoTL at your institution. *NOTE: If you haven't organized or led any programs yet, that's okay, put "N/A" and go to Part 3.*

What are you **currently offering** in terms of SoTL programs or resources to engage or support instructors in SoTL projects of their own?

Program, Event, or Resource Name and Start Date (e.g., Year)	[fill in SoTL program name]	[fill in SoTL program name]	[fill in SoTL program name]
Program Model[2] – What SoTL model does this program best align with? Other relevant details about the program? **Goals** – What do you want participants to know, be able to do, or produce by the end? Other program goals? **Status** – What's working well and why? What could be improved? **Alignment** – How does your SoTL program align with your center's mission? Institution's mission?			

(Continued)

2 1. Curated collections / self-guided materials
   2. "Unprogramming"
   3. "How to" informational workshops
   4. One-on-one consultations
   5. SoTL project development institutes
   6. SoTL write-ins or writing retreats
   7. Faculty learning communities / reading groups

   8. CTL collaborations
   9. Train-the-trainer model
   10. Students as Partners in SoTL
   11. Incentives to do SoTL
   12. Awards or title recognizing SoTL faculty
   13. SoTL showcases

(Continued)

Program, Event, or Resource Name and Start Date (e.g., Year)	[fill in SoTL program name]	[fill in SoTL program name]	[fill in SoTL program name]
Aspirational Plans – How would you like to develop this program further?			

Part 3. Aspirational SoTL Programming or Initiatives

Part 3 is intended to help you think big! What would you like to do? What types of programs or resources are you currently planning to create or develop through this strategic planning process? Or alternatively, what programs or resources would you like to create but are beyond your current financial and staff capacity (aspirational programming)?

Program, Event, or Resource Name	[fill in tentative SoTL program name]	[fill in tentative SoTL program name]	[fill in tentative SoTL program name]
Program Model[3] – What SoTL model does this program best align with? Other relevant details about the future program?			

(Continued)

3 1. Curated collections / self-guided materials
   2. "Unprogramming"
   3. "How to" informational workshops
   4. One-on-one consultations
   5. SoTL project development institutes
   6. SoTL write-ins or writing retreats
   7. Faculty learning communities / reading groups
   8. CTL collaborations
   9. Train-the-trainer Model
   10. Students as Partners in SoTL
   11. Incentives to do SoTL
   12. Awards or title recognizing SoTL faculty
   13. SoTL showcases

(Continued)

Program, Event, or Resource Name	[fill in tentative SoTL program name]	[fill in tentative SoTL program name]	[fill in tentative SoTL program name]
Goals – What do you want participants to know, be able to do, or produce by the end? Other program goals?			
Alignment – How does this intended SoTL program align with your center's mission? Institution's mission?			
Outcomes – What will you have participants do to accomplish your program goal(s)?			
Resources – What else do you need to consider (e.g., resources, collaborators, stakeholders)?			
Program Model[4] – What SoTL model does this program best align with? Other relevant details about the future program?			

(Continued)

4 1. Curated collections / self-guided materials
   2. "Unprogrammi
   3. "How to" informational workshops
   4. One-on-one consultations
   5. SoTL project development institutes
   6. SoTL write-ins or writing retreats
   7. Faculty learning communities / reading groups
   8. CTL collaborations
   9. Train-the-trainer Model
   10. Students as Partners in SoTL
   11. Incentives to do SoTL
   12. Awards or title recognizing SoTL faculty
   13. SoTL Showcases

(Continued)

Program, Event, or Resource Name	[fill in tentative SoTL program name]	[fill in tentative SoTL program name]	[fill in tentative SoTL program name]
Goals – What do you want participants to know, be able to do, or produce by the end? Other program goals? **Alignment** – How does this intended SoTL program align with your center's mission? Institution's mission? **Outcomes** – What will you have participants do to accomplish your program goal(s)? **Resources** – What else do you need to consider (e.g., resources, collaborators, stakeholders)?			

Part 4. Prioritizing SoTL Programming

Part 4 is intended to help you prioritize which programs you would like to launch in the coming 1–2 years. Review your Part 3 responses and consider the following questions as you fill in your pros and cons table for each of your aspirational SoTL programs:

- What resources does this program require? Do you or your center have capacity to support that in the next 1–2 years?
- What strategic partners or stakeholders might be important for launching this program?

- How well does this program align with strategic priorities of your center and/or university?
- What level of impact do you seek (in terms of numbers reached, knowledge gained, work produced, etc.) as a result of this program?
- Do you feel the balance between resources required and anticipated impact are well matched?

SoTL Program Name	Pros for Implementation	Cons for Implementation

Part 5. Next Steps in Launching New SoTL Programming

Part 5 is intended to help you begin to develop plans to implement 1–2 SoTL programs, including articulating the purpose and value of these SoTL programs, planning for assessment of those programs, and developing a tentative timeline for action.

Now that you have considered the pros and cons of different program ideas and discussed your SoTL plans with a partner, select 1–2 programs that you plan to develop in the next year and write the name of the program(s) you intend to develop in the table below. Review your descriptions of these two programs from Part 3 and craft a short narrative that would articulate the program to one of your colleagues. Consider the following questions as you write this narrative: Who is your audience for this narrative (e.g., administrator? prospective faculty participants? possible co-facilitator?)? Why does this program matter for this colleague? For your institution?

[fill in tentative SoTL program name]	[fill in tentative SoTL program name]
[fill in tentative SoTL program description]	[fill in tentative SoTL program description]

SoTL Program Assessment

An essential part of program development and implementation is planning for assessment. You will need to understand the efficacy of the programs you develop, both to continue improving them for the future and to know whether they should become more (or less) central to your center's offerings. Fill in the table below for the program(s) you have just described.

	[fill in tentative SoTL program name]	[fill in tentative SoTL program name]
Goals – Copy your goals for each SoTL program from Part 3. **Assessment** – How will you know you have accomplished your goals or met your desired outcomes for your SoTL program? What evidence will you need to collect (e.g., surveys, products/ outcomes, interviews/focus groups, self-reflections)? **Logistics** – When will you collect your evidence? Who will collect it?		

SoTL Program Timeline

We can have the best intentions and grand program ideas, but our success as faculty developers implementing programs is often wrapped up in the details and timeline of program planning. Take a moment to articulate your timeline plans—if you are new to developing these types of programs or new to faculty development in general, the more detail you can provide the better, so that your peers can give you more meaningful suggestions or things to consider based on their experience.

When do you plan to plan, implement, and assess your efforts? (You may want to think big picture or get in the weeds of program planning, whichever is most helpful for you.)

June–August	September–November	December–February	March–May
_____	_____	_____	_____

June–August	September–November	December–February	March–May
_____	_____	_____	_____

June–August	September–November	December–February	March–May
_____	_____	_____	_____

Other notes for yourself or your team:

Appendix B: Scholarship of Teaching and Learning (SoTL) Program Taxonomy

Created through an iterative design process by the SoTL Collaboratory Leadership Team (First version produced December 2020; this document is version 5):

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Context for Taxonomy Development:

The purpose of this document is to offer a common language and organizational structure for understanding a variety of SoTL program models. While the SoTL Program Taxonomy was initially developed to support educational developers who may be tasked with leading SoTL program support for their institutions, this tool may also be helpful to a range of scholars and practitioners across higher education who are seeking ideas for how to support SoTL. This document contains an overview of the taxonomy organized by program type and a detailed description of each model. This document also includes a brief example of each model to further support readers' envisioning of program possibilities. Because this document was derived from our community of practice (see Lukes et al., 2023), the examples that follow draw

Table 1. Overview of SoTL Program Taxonomy Categories and Models

SoTL Program Category	SoTL Program Models	Brief Description
On-Demand Project Development Programs	1. Curated resource collections, self-guided materials, or databases	Access to SoTL resources to help faculty learn about and do SoTL
	2. "Unprogramming"	Informal discussion—often through social media—and/or Q&A about SoTL with peers
Short-Term or One-Off Project Development Programs	3. "How to . . . " SoTL informational sessions or workshops	A short event, or series of events, where faculty learn about SoTL
	4. One-on-one consultations	One-on-one exchange w/CTL SoTL expert to help support instructor's SoTL project(s)
Immersive Project Development Programs	5. SoTL project development institutes	An organized gathering of individuals over a short period of time to make significant progress on developing a SoTL project
	6. SoTL write-ins or writing retreats	An organized gathering of individuals working on moving SoTL projects toward dissemination
Extended or Ongoing Project Development Programs	7. SoTL faculty learning community or reading group	An organized gathering of individuals over time (e.g., term) to engage in producing or consuming SoTL
	8. CTL collaborations	CTL SoTL expert as a formal partner or co-PI role in SoTL project
	9. Train-the-trainer model (faculty or graduate student SoTL Fellows)	A program that trains faculty or graduate students in SoTL methodologies to assist others in their SoTL projects
	10. Students as Partners in SoTL	A program supporting student partnership as co-inquirers with instructors in SoTL work
Incentive, Recognition & Dissemination Programs	11. Incentives to develop or complete SoTL project	Financial or staffing incentives to reduce barriers for faculty engaging in SoTL
	12. Awards or title recognizing faculty engaged in SoTL work	Non-monetary awards and recognition for faculty to acknowledge SoTL work (primarily for tenure & promotion)
	13. SoTL showcases/conferences (local dissemination events)	An one-time or annual event where SoTL projects are presented/shared with others

Note. The categories and models are fluid and dependent on how educational developers structure and implement their SoTL program models.

predominantly on our respective institutions. Examples drawn from beyond our institutions were generated during group discussions and workshops that applied this tool.

On-Demand Project Development Programs

1. *Curated Collections, Self-Guided Materials, or Databases*

Definition:

Programs that facilitate access to curated collections of SoTL information and resources (e.g., web page with selected reading resources, links to SoTL design tools, videos sharing directions on how to do SoTL) or asynchronous online learning modules on SoTL topics via a learning management system (LMS).

Example in Practice:

James Madison University developed an asynchronous website through the Center for Faculty Innovation web page to provide a "how to" SoTL for instructors unfamiliar with the process. It has resources explaining what SoTL is and how to develop research questions, select the methods and measures, obtain IRB approval, and disseminate information. There are also videos of SoTL researchers from the institution talking about how they began their SoTL work. https://www.jmu.edu/cfi/scholarship/sotl-ets/main.shtml

2. *"Unprogramming"*

Definition:

Asynchronous or synchronous digital or physical spaces in which people interested in SoTL can informally discuss SoTL ideas or ask questions

of peers; no formal "expert" guidance or facilitation from CTL staff provided, though CTL staff may participate in discussions or events.

Example in Practice:

From 2017–2019, McMaster University's MacPherson Institute for Leadership, Innovation, and Excellence in Teaching hosted a monthly Twitter Chat about Students as Partners in teaching and SoTL. For one hour, a moderator posted discussion questions on Twitter with the hashtag #SaPChat on a MacPherson account specific to their Students as Partners programming (@McMaster_MI_SaP). Participants on Twitter–both at their institution and inter-nationally—responded to the questions and replied to one another in this semi-synchronous space. Questions ranged from broadly analyzing Students as Partners practices to specifically responding to SoTL readings the account prompted people to review before the chat, such as:

Q1: The essay highlights vulnerability in partnership. How have you resolved issues of vulnerability and built trust in your practice? #SaPChat #studentsaspartners

Because tweets live on, interested people unable to join during the hour could still participate in the days and weeks following the event.

Short-Term or One-Off Project Development Programs

3. *"How to. . ." SoTL Informational Sessions or Workshops*

Definition:

A single event or series of events in which participants receive infor-mation about what SoTL work is and how it is done (e.g., methods, developing a research question, IRB approval) from SoTL experts or

those with prior SoTL experience; time length varies, but typically short events (e.g., 60–90 minutes).

Example in Practice:

We developed a workshop series with the goal of gathering faculty interest around SoTL in the research university context. We now typically host two to three workshops each semester on topics such as SoTL for Beginners, Refining Your SoTL Research Question, and Choosing Your SoTL Study Design. These workshops are often facilitated by a faculty fellow or an invited national speaker. We also host faculty SoTL Scholar panels to share their projects and study findings with the broader campus community.

4. One-on-One Consultations

Definition:

A one-on-one or one-on-team exchange that involves CTL staff serving as expert advisors for a specific SoTL project (e.g., project design, methods, data analysis); varies in scale and scope from CTL staff providing feedback on SoTL project ideas via single or multiple emails/meetings. CTL staff member acts in an advisory role rather than a collaborator role on the project.

Example in Practice:

George Mason University's Stearns Center for Teaching and Learning provides opportunities for faculty to request one-on-one consultations at any point during their SoTL work. Prior to meeting, requestors are asked to indicate the level of consultation and support they are interested in to help clarify the anticipated role and time commitment of the CTL staff (advisory or support or partner). The initial meeting typically serves as an intake of information so the CTL faculty can support the project's success. These meetings are initially scheduled for about

an hour, and follow-up meetings are at the request of the faculty. The CTL faculty offers support for all aspects of SoTL work, including research design, data collection and analysis methods, implementation (including guidance around course design to allow for the SoTL work to be appropriately implemented), identification of appropriate journal(s), and even assistance in the IRB process.

Immersive Project Development Programs

5. SoTL Project Development Institutes

Definition:

An organized gathering of a cohort of individuals or teams working on SoTL projects meeting over a short period of time (typically a few days or a week) with a shared goal to make significant progress on developing some aspect of a SoTL project; scope varies (e.g., skills development, project design, data analysis, developing a dissemination strategy and plan, producing a presentation or article); level of expert guidance can vary, but programming typically includes an opportunity for participants to get feedback on their specific project as a whole or in part.

Example in Practice:

The SoTL Scholars program at the University of Virginia seeks to empower and lower barriers for faculty to learn about and engage in SoTL. As part of this program, faculty across various disciplines participate in a 3-day institute where they gain the knowledge and skills needed to successfully plan and implement a SoTL project over the subsequent academic year. During these 3 days, faculty work in small groups on various activities to help them explore relevant SoTL topics and ideas, then have opportunities to work on applying their

knowledge and skills to developing their own SoTL project. On Day 1 of the institute, faculty learn about SoTL, how to develop strong research questions, and where to search for SoTL literature. On Day 2 of the institute, faculty learn about various SoTL study designs, sources of evidence, and ethical SoTL research. Throughout the day, faculty have opportunities to begin developing their SoTL project's study design. On Day 3 of the institute, faculty learn about instrumentation, measurement, and validity/reliability. They have opportunities to identify currently developed instruments or work on developing their own instruments. By the end of the institute, each SoTL Scholar has a drafted SoTL project and is prepared to begin working on their Ethics Review Board application. Three follow-up workshops throughout the academic year help support SoTL Scholars in data collection, analysis, and dissemination of their project.

6. SoTL Write-Ins or Writing Retreats

Definition:

An organized gathering of individuals or teams working on SoTL projects who share the common goal to produce SoTL products (e.g., grant proposal, presentation, article) and seek community and/or accountability; frequency varies from a single day, a few days, or on a regular basis over a longer period (e.g., semester, year); may be spontaneous participation (i.e., whoever shows up) or organized cohort-based.

Example in Practice:

The Center for Excellence in Teaching and Learning (CETL) at Virginia Tech has partnered with the Office of Faculty Affairs to offer multi-day writing retreats for faculty needing focused time on their writing process. The retreats are typically held in person and often at an off-campus location with provided food and beverage service throughout the day. In addition to dedicated writing time, the Office of Faculty Affairs

provides small breakout discussions and consultations with writing experts throughout the day to help inspire and support the writing process. CETL faculty engage in the retreat by remaining available throughout to offer consultations on the SoTL process on whatever phase of the process the faculty is in. The writing retreats are typically during the summer and winter semester breaks. The CETL serves as a support component of the larger writing retreat.

Extended or Ongoing Project Development Programs

7. SoTL Faculty Learning Community or Reading Group

Definition:

An organized gathering of individuals, a project team, multiple teams, or combination of individuals and project teams that meet on a regular basis over longer periods of time (e.g., a semester, academic year) with goals to exchange knowledge, resources, and feedback (specific structure varies); typically involves people working on individual or team projects but could be a reading group examining the published work of others.

Example in Practice:

The Center for Teaching at the University of Mary Washington hosts a three-semester faculty learning community called SoTL Scholars. The group meets monthly each semester. In the first semester, members learn more about SoTL by reading articles, hearing from guest speakers who explain components of the SoTL process (such as IRB), and creating their own IRB proposal for a SoTL project. In the second semester, members implement their SoTL projects in their own courses while learning about venues for publicly sharing SoTL work, such as journals and conferences. In the third semester,

members convene for monthly writing time. At the beginning of the third semester, members determine a goal for publicly sharing their work at the end of the semester; then, at each individual meeting, members celebrate progress, set micro-level goals for the writing time, and then close with goals for what they will accomplish by the next meeting.

8. CTL Collaborations

Definition:

A one-on-one or one-on-team exchange that involves CTL staff serving as collaborators in a SoTL project; varies in scale and scope from CTL staff co-constructing SoTL project ideas via single or multiple emails/meetings to full, formal co-PI involvement of CTL staff in SoTL project (e.g., project design, survey design and development, data collection, analysis and synthesis).

Example in Practice:

Virginia Tech's Center for Excellence in Teaching and Learning provides opportunities for faculty to request one-on-one consultations at any point during their SoTL work. The initial meeting typically serves as an intake of information so the CETL faculty can support the appropriate design and implementation of the work. These meetings are initially scheduled for about an hour, and follow-up meetings are at the request of the faculty. The CETL faculty offers support for all aspects of SoTL work, including research design, data collection and analysis methods, implementation (including guidance around course design to allow for the SoTL work to be appropriately implemented), identification of appropriate journal(s), and even assistance in the IRB process. CETL faculty have served as consultants to introduce faculty to this work as well as co-PI and have also engaged in the writing and publication process.

9. Train-the-Trainer Model (Faculty or Graduate Student SoTL Fellows)

Definition:

A program that trains faculty or graduate students in SoTL methodologies so they can serve as SoTL project consultants for others or assist in collecting/analyzing data for SoTL projects; vary in terms of size (e.g., single trainee, cohort of trainees), timeline (e.g., single training session, regular meetings over a semester or year), and scope (e.g., data collection only, analysis only).

Example in Practice:

The Engaged Teacher-Scholar (ETS) program at James Madison University (JMU) offers faculty support in creating and sharing evidence-based teaching and learning scholarship. The goal of the ETS program is to recognize JMU faculty who engage in meaningful evidence-based teaching and learning scholarship. The program aims to support faculty growth in a process of becoming ETS leaders across JMU's campus. Faculty chosen to participate as ETS leaders receive professional development funds for the year to support their professional goals. They are trained by a faculty associate at the Center for Faculty Innovation on how to provide faculty professional development. The ETS leaders then plan, implement, and evaluate at least two SoTL professional development events within their departments or colleges while making progress on their own SoTL research projects.

10. Students as Partners in SoTL

Definition:

A program that supports undergraduate or graduate student partnership as co-inquirers with instructors and/or educational developers in

SoTL work. This may take the form of co-research partnerships but may also involve students serving as co-organizers of SoTL programming and SoTL support through a CTL.

Example in Practice:

Elon University's Center for Engaged Learning (CEL) hosts a program called the CEL Student Scholars—a 3-year, mentored opportunity for students to collaborate with Elon University faculty and staff on CEL's international multi-institutional research teams. Student Scholars receive up to $5,000 in stipends annually to support their active participation in SoTL and higher education research. For example, three current Student Scholars are collaborating with Elon faculty to examine the question: How do we make learning experiences meaningful for all students?

Incentive, Recognition & Dissemination Programs

11. Incentives to Develop or Complete SoTL Project

Definition:

Something offered to faculty that is designed to reduce common barriers to faculty engaging in or disseminating SoTL work: financial or time incentives (e.g., seed grants, stipend, course buy-out) to provide time or compensation for SoTL workload; staffing incentives (e.g., GRA hours) to assist instructor in the design and/or implementation of a SoTL project, reducing instructor SoTL workload; or financial incentives specific to supporting instructors to disseminate work (e.g., conference registration, particularly if venue is outside of discipline-specific venues).

Example in Practice:

As part of the SoTL Scholars program at the University of Virginia (see #5 "SoTL Project Development Institutes" Example in Practice for a description of the program) faculty participants receive multiple incentives intended to lower barriers to conducting and disseminating SoTL. These incentives include (1) professional development funds during the program to support their course, data collection, and/or analysis; (2) graduate student or postdoctoral researcher support for data collection; (3) specific SoTL-related support from librarians and the Ethics Review Board; and (4) post-program grant fund opportunities to support dissemination of SoTL project and/or expansion of SoTL research.

12. Awards or Title Recognizing Faculty Engaged in SoTL Work

Definition:

A form of incentive that aims to overcome the barrier of promotion and tenure bias toward SoTL work; varies from a formal university award to an honorific affiliation with the CTL (e.g., faculty fellow, SoTL Scholar) to a featured SoTL presenter tag in a pedagogy conference or showcase event that distinguishes it as data-informed work (e.g., "SoTL project").

Example in Practice:

The Center for Teaching at the University of Mary Washington recognizes cohorts of SoTL Scholars who commit to a three-semester community of practice to design, implement, and disseminate findings from their own SoTL projects (see #8 "SoTL Faculty Learning Community or Reading Group" Example in Practice for a description of the program). For the three semesters that members participate in the community of practice, they are recognized as SoTL Scholars.

13. SoTL Showcases/Conferences (Local Dissemination Events)

Definition:

An event in which SoTL projects are presented with goals of creating a local (institution-specific) space for faculty to share their SoTL projects or results beyond their own practice and meet other SoTLers from their institution (i.e., build a SoTL community); vary in size (e.g., six from a cohort-based program like a development institute, group of 50 from across a university); scope (e.g., works in progress, results); and level of university engagement (e.g., only SoTLers and CTL staff, upper administrator attending).

Example in Practice:

George Mason University's Stearns Center for Teaching and Learning hosts an annual 1-day conference. As part of those proceedings, the conference team solicits proposals for a SoTL Showcase—an interactive 90-minute session in which a convener invites 11 SoTL lightning talks (<5 min.) from George Mason instructors about their ongoing or recently completed SoTL projects. Following these talks, the session convener facilitates a roundtable discussion about the talks and SoTL. This provides an excellent opportunity for scholars to share works in progress and amplify their SoTL.