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Constantly in flux: Agile planning in holistic educational development centers

Cara Meixner

Abstract

Holistic educational development supports multiple, intersected facets of the faculty career to include teaching and learning, research and scholarship, leadership, career planning, wellness, and more. This constructivist qualitative study explores the landscape of 12 holistic educational development centers, with focus on how their leaders engage their centers and units in strategic and operational planning. The moniker *constantly in flux* enveloped the results, pointing to agile, leaderful processes that blurred the boundaries between short- and long-term planning efforts. Core themes were *centering the faculty voice*, *leveraging disciplinary identity*, *trying methodologies on for size*, and *adapting agilely.* Disrupting commonly held stereotypes about strategic planning processes, directors illuminated the centrality of characteristics such as nimbleness, curiosity, transparency, experimentation, creativity, and collaboration. Study results point to opportunities for sharing, merging, and dissemination of planning frameworks across the holistic educational development network.

Keywords: holistic educational development, strategic planning, operational planning, agile planning

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Dominantly, the scholarship of educational development reflects the work of centers for teaching and learning (CTLs; Sutherland, 2018), with focus on varied provisions and methods of instructional support for faculty. Less common, both in the empirical literature and in practice, are insights gleaned from educational development centers and units that support faculty members' holistic development, embracing facets of the faculty career that expand beyond teaching to encompass scholarship and research, creative activities, leadership development, service and outreach, career planning, wellness, and more.

Relatedly, the literature offers little insight into how and with whom such centers engage in deliberative planning processes that support faculty needs while responding to internal and extra-institutional trends. The canon of educational development literature lacks empirical guidance for educational developers seeking models and templates upon which to contemplate building holistic efforts. For CTLs whose missions have expanded into holistic realms, or for entities founded upon holistic grounds, through what measures are planning enacted and momentum sustained? This constructivist qualitative study seeks to explore the terrain of holistic educational development centers (HEDCs), focusing on how such entities strategically persevere, the ways in which planning is manifest, and with whom directors and centers collaborate.

Contextualizing this inquiry is literature in three core areas: holistic educational development, which establishes a practical basis for research; strategic and operational planning, which previews how efforts may transpire institutionally; and planning in CTLs.

Holistic Educational Development

Holistic educational development, which forges the study's conceptual framework, supports facets of the faculty career that span beyond teaching and learning, like research, service, leadership, and career planning. Zahorski (2002) wrote of the capacity of centers to support, nurture,

and amplify faculty scholarship through synergistic means linked to other facets of the faculty career. Doing so fosters a gestalt, "the almost magical effect of the whole becoming greater than the sum of its parts, that really makes the difference, creating a transformative energy that permeates a campus culture" (p. 30). To achieve this aim, efforts transcend focus on instructional development, leveraging opportunities for personal and organizational growth. Herein, interinstitutional liaisons and partnerships are key. Holistic approaches, particularly when collaborative, have the potential to affect change not only in individual faculty members but also cross-institutionally (Zahorski, 2002).

Educational development did not always prioritize instructional effectiveness over holistic initiatives; the earliest faculty development initiatives, typified by Sorcinelli et al. (2006) under the auspices of Age of the Scholar, "were largely focused on improving scholarly and creative performance" (p. 16). Though the ensuing Age of the Teacher emphasized teaching, scholars such as Bergquist and Phillips (1975) suggested during that period three dimensions around which development efforts should optimally center: instructional, organizational, and personal development. Through the 1980s and 1990s, the respective Ages of the Developer and the Learner (Sorcinelli et al., 2006), holistic initiatives multiplied (Gaff & Simpson, 1994), though most centers focused on teaching and learning.

In the ensuing timeframe, the literature alluded lightly to holistic development. Sugrue et al. (2018), in a systematic review of over 100 peer-reviewed studies across 20 years (i.e., 1995–2015), sought to understand how the roles and responsibilities of academic developers evolved. Their analysis confirmed a focus in the empirical literature on instructional development, yet they also arrived at themes related to developers' identity formation and influence as institutional leaders. The contributions of developers to change initiatives grew vaster in a two-decade course, hearkening a call for more holistic foci. As responsibilities grow in complexity—with tighter alignment to institutional priorities—emphasis on more traditional provisions of educational development would be met with scrutiny (Sugrue et al., 2018).

Sorcinelli et al. (2006), the first to investigate what guides the work of educational developers, homed in on an overarching goal for the field: to improve student learning. Second was the goal of responding to faculty members' needs and interests, pointing to a holistic future for educational development. Boundary-blurring between research and teaching, increased costs associated with doing research, a need for balance among facets of the faculty role, calls for community-engaged work, and other factors required educational developers to think differently about their work (Sorcinelli et al., 2006). Of mention was the call "for a renewed commitment to helping faculty achieve a sense of wholeness and integration in their work" (p. 106).

Holistic support is further traced by Sutherland (2018), who recalled Leibowitz's (2014) earlier exhortation of academic development as a field, albeit "a hard term to pin down" (Sutherland, 2018, p. 261), that is focused on the improvement of teaching. Still, nascent pushes to expand educational development lurked as "prominent academic developers and scholars internationally were also calling for a more holistic approach" (p. 266). While Sutherland did not discourage teaching and learning's prominence, she articulated three areas around which holistic opportunities ought to be arrayed: the whole of the academic role, the whole institution, and the whole person. Sutherland argued for integration of teaching and learning with organizational development, researcher development, leadership development, and career development.

To return to Zahorski (2002), we are reminded of the centrality of holistic efforts: faculty roles and responsibilities are inherently intertwined; research and teaching, for instance, are often inseparable acts. Recent contributions to the literature by faculty affiliated with HEDCs demonstrate the agility of this integration. Brantmeier et al. (2017) described the impact of an off-site, overnight writing program that blends contemplative practices, scholarship productivity, and well-being. Relatedly, Kipps-Vaughan et al. (2018) detailed the role of an HEDC, alongside other partners, in advancing a campus-wide initiative for contemplative practices.

Strategic and Operational Planning

Across the literature, strategic planning (SP) is depicted as "an intentional leadership tool for setting future organizational directions in a dynamic environment that takes account of—and ideally engages—key stakeholders" (Immordino et al., 2016, p. 35). Generally, SP entails determining what an organization purports to accomplish and how organizational stakeholders will direct goals and resources toward stated aims (Barry, 1997; Mintzberg, 1994). While SP models abound (Trainer, 2004), three major steps constitute most processes: forming a strategy, implementing it, and evaluating results (Gordon & Fischer, 2015). A strategic plan differs from an operational plan, which details annual goals and objectives (Barry, 1997).

Strategic planning can be traced to the 1950s, entering higher education in the 1960s through the founding of the Society for College and University Planning (Dooris et al., 2002). Initial foci were space and facilities, expanding in subsequent decades. Therein, linear and systematic approaches dominated the scene: craft mission, vision, and values statements; involve key stakeholders; conduct varied environmental scans; set concrete goals and objectives; and evaluate progress. Evident in the 1990s were departures from typical conceptions (Dooris et al., 2002). The formulaic approach grew "tempered with a cultural-environmental-political perspective" (p. 7), debunking staged approaches to planning. Relatedly, planning amplified creativity, dynamism, fluidity, and imagination (Dooris et al., 2002). Finally, focus was directed to *doing* over planning.

Today, SP reigns with ubiquity in higher education, often synonymous with the intersected accreditation, compliance, and assessment movements. Though SP is common, with many units touting their plans as goalposts, the methodologies used are vast, diverse, and interdisciplinary (Trainer, 2004)—some grounded in evidence-based procedures and others arriving from experience and instinct. Reminiscent of Mintzberg (1994), who referred to SP as oxymoronic, many now see plans as malleable, necessitating a posture open to change.

Across approaches, broad-based engagement, particularly from faculty, is key. Thompson (2017) asserted, "unless there is system-wide faculty involvement in the strategic planning exercise then the plans that emanate from the exercise are likely to be ineffective or even stillborn" (p. 11). Correspondingly, faculty are prone to engage when there is clear value, collective ownership is ensured, contributions are welcomed, and past planning informs the future (Thompson, 2017).

An array of institution-specific studies showcases fixed to flexible planning methods. The balanced scorecard (BSC) approach employed by Brigham Young University linked short-term actions with long-term strategy, focusing on four perspectives: customer, financial, internal processes, and organizational capacity (Spackman et al., 2015). Cleveland State University embraced a communicative planning methodology; though structured, "the use of a bottom-up, collaborative model maximized participation" (Kogler Hill et al., 2009, p. 25). Philadelphia University's participatory process was guided by an action research orientation and grounded in Eckel and Kezar's (2003) markers of transformative change (Antheil & Spinelli, 2011).

Cordeiro and Vaidya (2002) detailed California State University's two distinct approaches to strategic planning, one more effective than the other. An early model focused on crafting key performance indicators (KPIs), which over-emphasized data collection at granular levels. A new model, introduced in the mid-1990s, deemphasized tactical planning and privileged the alignment between strategy and the university's environment (Cordeiro & Vaidya, 2002). The planning process emphasized flexibility in response to internal and external flux.

SP in higher education has room for development. Gordon and Fischer (2015) found that few institutions follow precepts, many lose momentum, and not all embrace continuous improvement. Many plans "contain elegant and platitude-like statements with little or no ability to measure results" (p. 15). Immordino et al. (2016) underscored the importance of assessment; this reengages stakeholders and improves future planning. Law Snyder (2015) denoted pertinent action items to mitigate planning perils, like consulting broadly, utilizing a qualified

consultant, privileging all voices, establishing a daring vision, creating a small number of spotlight initiatives, setting a timeline that is revised annually, tying efforts to budget and development efforts, recognizing needed resources, and allowing failures to influence future planning.

Planning in Centers for Teaching and Learning (CTLs)

The literature on planning in educational development arises from CTLs in the United States and abroad. Most contributions focus on methodologies used by developers to plan strategically or on conditions influencing planning. The term *strategic educational development* is used frequently, speaking to practices and conditions that influence teaching and learning initiatives and guide change. As editor to a special issue on strategic educational development, Bolander Laksov (2008) highlighted challenges that developers surmount. To plan strategically is to embrace an action research approach, which establishes an intersubjective positionality for the developer. Per Bolander Laksov, this "can be an important vehicle for bringing the profession of educational developers closer to the academics and the organization of the university by situating them within the community of practice of researchers, rather than outside" (p. 91).

Within the same issue, Stigmar (2008) brought an action research method to the fore, which operated across three facets of a Swedish institution: at the university level, where it guided faculty development plans; at the program level, where developers integrated the program into university activities; and at the unit level, wherein each department infused educational development into its work. Through cycles of action research, Stigmar found it integral to achieve support from "high-status informants" (p. 112) like heads and deans. Achieving a balance between top-down edicts and faculty needs was paramount. Also, Stigmar discovered inadequate knowledge among faculty of the worth of educational development, signaling a broader need for strategic connection to instructors' professional development aims.

In Sweden, Roxå and Mårtensson (2008) explored what it meant for developers to engage in "far-reaching, long-term change" (p. 156). The Swedish Network for Educational Development in Higher Education had earlier implored colleagues to act more strategically; this eventuated in a national course. Operating as a community of practice, the course, with 34 participants, met full-time for 5 weeks; together, 26 SP projects were completed. Roxå and Mårtensson found that the course buffered developers' initial tendencies to take unscholarly approaches. The notion of strategy as militaristic was debunked in favor of a transformational perspective steeped in motivation, engagement, conviction, and inspiration (Roxå & Mårtensson, 2008). Furthermore, developers interpreted strategic work as "supporting communication between and within different levels in the institutions" (p. 163). Being strategic also meant "[opposing] an instrumental interpretation of being strategic sometimes put forward by institutions and management" (p. 166).

Albon et al. (2016) relayed their experiences of SP for a new center in British Columbia. The team recounted a timeline of planning activities, denoting challenges incurred by time, competing tasks, and loss of momentum. Citing a "non-linear and messy" (p. 208) experience, they offered recommendations. They implored colleges to "write about their processes in order to contribute to the strategic planning literature" (p. 216). Accepting strategic planning as an iterative process is integral (Albon et al., 2016), as is setting boundaries around planning time. Furthermore, external facilitators can serve impartially and provide valuable insight. To add, Albon et al. recommended conducting environmental scans of faculty to inform planning and engaging diverse stakeholders, particularly senior administrators.

Inclusive and participatory SP processes invite opportunities to get ahead of external challenges, such as changes in government policy and declines in public funding (Shah, 2013). Within educational development, tools that can be utilized for participatory planning are emerging. For instance, *A Center for Teaching and Learning Matrix* (POD Network and American Council on Education, 2018) invites centers to

identify their developmental level across three broad domains of practice: organizational structure, resource allocation and infrastructure, and programs and services. The matrix can be adapted as "a frame for goal-setting, strategic planning, prioritizing and scaling efforts, benchmarking, self-study, program review, and/or reflection" (p. 3).

Methodology

This study addressed the following question: *What are the lived experiences of educational developers who have led HEDCs in planning processes ranging from informal to established?* The methodology, reliant upon semi-structured interviewing through an online interface, invited insight into how and with whom planning transpires. The study was approved by the Institutional Review Board; all participants consented to recording.

Constructivism

Constructivist methods summon the rendering of multiple meanings, inviting scholars to follow novel leads, to see things in different ways, and to recalibrate data collection as analysis transpires (Charmaz, 2014). Theoretically, this study has roots in symbolic interactionism; humans act toward objects and others according to meanings, which are constructed through interaction (Blumer, 1969). While the basic, interpretive qualitative approach advanced by Merriam and Tisdell (2016) framed the study, constructivist grounded theory methods enhanced trustworthiness and guided coding, analysis, and interpretation (Charmaz, 2014).

Participants

Twelve directors of HEDCs in the United States participated. Utilizing the POD Network's online list of affiliated centers, I mined missions,

visions, or other materials available on the internet, searching for evidence of purpose or initiatives that extended beyond teaching and learning and were coordinated through the center. From there, I crafted a three-tiered list; 13 centers (Group A) had offerings in two or more areas beyond teaching and learning (e.g., scholarship, leadership, creative activity, service, career development), six centers (Group B) had offerings in at least one area beyond teaching and learning, and 17 centers (Group C) were predominately focused on teaching and learning with bourgeoning holistic initiatives.

Embracing purposeful sampling (Patton, 2002), I first invited participants from Groups A and B. Of the 13 directors in Group A, 10 (77%) participated. Of Group B, two directors (33%) participated. Given thematic saturation (Seidman, 2006) across the 12 interviews, no participants were sought from Group C. To ensure confidentiality, I assigned each participant a gender non-specific pseudonym and removed names of centers and institutions. Transcripts were audited for accuracy and anonymity, reviewed by participants before coding commenced. Interviewees reserved the right to redact content.

Each HEDC was nested within a not-for-profit institution of higher education. Seven universities (58%) are public, and five (42%) are private. At the time of study, institutions were classified by the Carnegie Commission as follows: doctoral, very high research (n = 4; 33%); masters comprehensive, larger (n = 3; 25%); doctoral, high research (n = 2; 17%); doctoral/professional (n = 2; 17%); and masters comprehensive, medium (n = 1; 8%). Student enrollment ranged from 3,383 to 47,090.

Data Collection

Many qualitative methods are non-linear; question generation, interviewing, and analysis occur iteratively (Bowers, 1988; Charmaz, 2014; Merriam & Tisdell, 2016). In this study, interviewing and coding co-occurred, inviting nascent insights from the analyzed data to be explored through additional interviews. I drew inspiration from Seidman (2006), which identified three analytic levels: what participants

were saying, how their inner (unguarded) and outer (tentative) voices interfaced, and how "interviewers—like good teachers in a classroom—must listen while remaining aware of the process as well as the substance" (p. 79). Held on Zoom, interviews were 35–55 minutes in length.

The Self as Instrument

Van Manen (1990) wrote that through research, "we question the world's very secrets and intimacies which are constitutive of the world, and which bring the world as world into being for us and in us" (p. 5). At the time of this study, I was the executive director of a HEDC. Responsible for co-architecting center planning, I sought connection, ideas, and constructive challenge from external peers; this prompted the desire to engage in research. Furthermore, I hoped to share widely the very questions left unaddressed in the literature, in my conference experiences, and through my reviews of listserv postings. Throughout the process, I utilized analytical memoing (Bowers, 1988; Charmaz, 2014) to reflect on assumptions related to my positionality and to record my journey through interviewing, coding, and analysis.

Analysis

I applied Schatzman's (1991) dimensional analysis (DA) to code, analyze, and interpret the data. DA is a grounded theory framework for making meaning of dense data through three phases. First is *dimensionalizing*, wherein data are designated to abstract representations called codes. I coded the first seven interviews not in accord with my interpretations, but through actionable words describing the participants' experiences. In the second phase, *differentiation*, coding focused on constant comparative analysis within and across interviews (Charmaz, 2014). The goal of ensuing interviews, in addition to gathering insight into lived experiences, evolved to explore what emerged

through *dimensionalizing*. The final stage, *integration*, entailed the sorting of codes into categorical representations (i.e., themes, subthemes) (Schatzman, 1991).

Results

In the section that follows, I first showcase how participants typified holistic educational development—in terms of their respective centers' evolutions and programming areas offered. Thereafter, I reveal the principal results of the study, which illuminate how and with whom planning is manifest. The latter are best understood under an organizing perspective titled *constantly in flux*; this served to focalize four themes: *centering the faculty voice*, *leveraging disciplinary identity*, *trying methodologies on for size*, and *adapting agilely.*

Typification of Holistic Centers: Founding, Programming Areas, and Participants

Each participant shared that their center offers a range of holistic educational development initiatives beyond teaching and learning; these are depicted in Table 1. Centers came to be holistic typically by one of the following ways: the centers started as a CTL yet shifted intentionally (n = 6; 50%); were rechartered as an HEDC, replacing a defunct CTL (n = 4; 33%); or were founded as an HEDC (n = 2; 17%). All centers embraced holistic emphases due to an intentional, deliberate dedication to meeting faculty members' whole professional development needs. One participant, Remy, encapsulated this sentiment:

> If we're going to be working with people on teaching and learning, we need to bear in mind what else is going on for them . . . what's happening for them as human beings . . . It just made sense that we started to focus more on trying to step back and think about people as whole academics rather than just as teachers.

Table 1. Areas of HEDC Programming Beyond Teaching and Learning

Programming area	n	%
Scholarship and research	**11**	**92%**
- Writing support programs	8	67%
- Sponsored programs (grant, IRB) support	6	50%
- General support for research development	5	42%
- Scholarship of teaching and learning (SoTL)	4	33%
- Other scholarship programs (e.g., on-campus journal)	3	25%
Career planning and development	**11**	**92%**
- General career stage programming	9	75%
- Mentoring initiatives	6	50%
- Orientation for new faculty	6	50%
- Productivity and purpose initiatives	3	25%
Innovation and creative activities	**11**	**92%**
- Grants supporting creativity and innovation	5	42%
- Coordination of celebrations and awards	4	33%
- Innovation exchanges	3	25%
- Innovation fellowships and residencies	3	25%
- Wellness and contemplative programming	3	25%
- Other innovation activities (e.g., problem-solving workshops)	3	25%
Leadership development	**6**	**50%**
- General programming on leadership and leader development	5	42%
- Initiatives for chairs/heads	3	25%
Diversity, equity, inclusion, and justice (DEIJ)	**6**	**50%**

Note. While all centers are engaged in supporting university-wide DEIJ initiatives, half of the centers explicitly develop, coordinate, offer, and assess their own DEIJ programs—often in conjunction with institutional partners.

Holistic efforts encompass face-to-face and online workshops, institutes/residencies, orientations, learning communities, consultations, grants and awards, fellowships, etc. Nine of the 12 institutions focused more efforts on teaching and learning, though other areas (e.g., research support) were growing. Another participant, Quinn, for instance, said, "I would say the majority of our focus is on teaching and learning, but we are also looking into scholarship as well as academic leadership support." Sawyer added that their center favors teaching and learning yet takes "a teacher-scholar model, so that would bring the scholarship up to, I'd say, second tier." Two institutions offered a proportional balance across areas; Morgan noted an emphasis on diversity and inclusion "but we're fairly balanced across." One HEDC, led by Charlie, "tried really hard to balance" but veered toward teaching due to administrative direction.

For most centers (75%), offering holistic programs extended their reach to faculty, especially those in disciplines formerly unlikely to seek teaching and learning development. All but one director cited adjunct faculty as most difficult to draw into programs. Over- and underrepresentation of faculty, per college or department, usually reflected institutional characteristics. At Chandler's institution, for instance, faculty affiliated with a professional school did not attend center activities, as that school hosted its own instructional support unit. At Sterling's university, lecturers teach a 5–5 load, which may preclude them from attending center events.

Constantly in Flux

Directors used words like *flux*, *evolution*, *agility*, and *adaptation* to describe the process of planning for their centers. Strategic and operational programming were characterized by four intersecting themes: centering the faculty voice, leveraging disciplinary identity, trying methodologies on for size, and adapting agilely. Though several directors drew inspiration from SP models endorsed by businesses (e.g., SWOT analyses), no one director followed a discrete or codified template. Charlie explained, "Strategic planning is getting a little out of fashion." Referencing the COVID-19 pandemic, "Everything we've had planned . . . basically just blew up . . . it's really important for faculty development centers to be [agile], because you can quickly become irrelevant if you're not watching pretty closely what's happening." Of note, directors employed cyclical, flux-responsive planning before and during the pandemic.

Centering the Faculty Voice

Directors of HEDCs centered faculty voices through most or all phases of planning, using formal and informal methods designed to elicit feedback on current offerings, assess needs for future initiatives, assure programs are delivered equitably, and bolster faculty support. Formal

methods entailed all-campus surveys, focus groups, and annual planning retreats that included faculty. On surveying, Alex commented, "One of the things we did last spring was a survey of our faculty, seeing what they would like. It had a couple [of] purposes. One was what topics they're interested in, and the other was trying to get to know who the faculty are." Each fall, Quinn's advisory council hosts focus groups, led by faculty for faculty:

> So rather than having [center staff] . . . we actually have the [council] go back to their constituents and representative groups and talk to them in hour-long sessions, and then we compile all of that information. . . . We follow up with surveys based on what we learned, and then have that drive a lot of our strategic planning and programming.

Seven of 12 directors engaged faculty in ongoing planning meetings or annual retreats. Sawyer, whose center's urban location is flanked by other institutions, hosts their annual retreat on these campuses: "That's what we do every year, and we've done it at other faculty development centers on [other] campuses, so it's free." Often, retreat participants are part of a formalized governance structure (e.g., advisory council) that rotates periodically and culls members from respective colleges or divisions. Some directors sought dispositional diversity; Remy recruited faculty with "different ways of looking at things in general, so we've got a skeptic and a systems thinker and an entrepreneurial thinker."

Informal methodologies were equally vital. Parker centered faculty voice through "one-on-one conversations" with faculty, which generated planning ideas. Several directors elicited feedback from department chairs and faculty senators. For Morgan, facilitating the university's council of chairs prompted consideration of new priorities. Charlie said reaching out to chairs to "ask them to ask their faculty what they need for professional development" provided perspectives on programming gaps.

Whether formal or informal, the key to centering faculty voice is transparency. Though time consuming, most interviewees "shared

back" data gathered from faculty (e.g., through digests, emails, and internal websites) and made strategic and operational plans available for faculty comment. Aptly stated by Jordan, "We share [our plans] with everybody. It's public info. We don't hide it." Quinn, who sends video updates, added, "So, we want faculty to know that they're part of the loop and not just gain their feedback and then be like, 'Thanks, we're good,' and then they don't really know if anything changed at all."

Leveraging Disciplinary Identity

As noted, directors seldom relied on codified templates to guide planning—in part because "standardized" processes were perceived as being unamenable to flux. Instead, they drew liberally or selectively from their educational backgrounds and professional experiences. Leveraging disciplinary identity, a vital influence in planning, was clustered into role-inspired subthemes with titles derived from participants' narratives: *the scientist-practitioner*, *the systems thinker*, *the creative humanist*, and *the teacher-scholar.*

The scientist-practitioner, educated in the sciences or psychology, applied an experimental, data-driven mindset to planning. For Chandler, a physical scientist, this translated into a penchant for experimentation and a tolerance for imperfection: "As a scientist, I'm used to the idea of measurement errors." Avery, trained in cognitive psychology, imparted the ideal to "teach people about how learning works" in programming and planning. "I guess my overarching mission is to infuse this science of how learning does and doesn't work into the greater university culture and teaching culture and knowledge structure."

With a degree in instructional systems design, Jamie typified the systems thinker subtheme. Systems thinkers approached planning in capacious ways, cogitating about both minutiae and long-range vision. Taking a backward design approach to planning, Jamie shared, "I think that's the only thing I know, so that's definitely what I tend to fall back on and apply to the work that I'm doing." Quinn, with training in adult and organizational development, applied a similar lens: "I would

definitely say my background helps . . . kind of challenges people to think outside the traditional academic box for strategic planning, for strategic initiatives."

Several directors were creative humanists: driven by curiosity, creativity, gut instinct, and critical thinking. Alex mused, "I'm an artist, first and foremost. And I'm creative and I'm curious and I'm collaborative, and so that is how I approach making plans." Remy's disciplinary orientation informed an ethical, transparent approach to planning: "If I have a gut instinct that something is not going to sit well and I have to take responsibility to say, 'I can't do that authentically.' So, can I find a way of making it authentic, or do we have to say no?"

Like the scientist-practitioner, the teacher-scholar valued evidence-informed experimentation but persistently advocated for instructional effectiveness and innovation. Sterling, a former high school science teacher, leveraged their background in "pedagogy, curriculum development, [and] how people learn." Morgan's experience was similar: "I think my background being in the classroom and supporting teachers and doing this with faculty as well [influences my center's work]."

Trying Methodologies on for Size

Linked indelibly to leveraging disciplinary identity was, for half the participants, an experience called "trying methodologies on for size." Absent best practices for HEDC planning, directors experimented carefully, curiously, and even whimsically with approaches gleaned from disciplinary experience, popular culture, industry, and/or other educational developers. Many directors engaged in a parallel process, asking questions akin to, "Does this approach 'fit' us? Would we do this again?"

Jordan used "appreciative inquiry for the long-term planning" and "strategic doing" for operational planning. Jamie adapted what they knew about course design, inviting faculty advisory board members to consider, "In five years, what do you want, what would make sense for faculty who have engaged with the center to still know? What would be

the good outcome for that? What would you want them to still be able to do and what do you want them to find value in?" Charlie, alongside 12 faculty representing different colleges, led "a set of design thinking activities" meant to inspire direction and creativity. And Quinn used problem- and team-based learning as grounds for planning.

Five directors adapted or implemented specific ideas gleaned from educational development conferences. Alex, who attended the Institute for New Faculty Developers (INFD), recalled "going to sessions where the other developers were handing out their versions of strategic plans to see where ours fit," whereas Remy enjoyed an international conference's "in-between conversations" as well as opportunities to get "ideas from people who are actually working in very different systems, and that seems to free my mind up to think, 'Well, how do I adapt that to [my center]?'"

Adapting Agilely

Adapting agilely was characterized by two subthemes: *aligning up* and *aligning across.* On aligning up, each director underscored the importance of engaging academic administrators (e.g., provosts), to the extent they were available, in planning; equally vital for five participants was ensuring their centers had ties to university strategic planning initiatives. Charlie described their role in university strategy: "I have . . . [a] very clear understanding of where the President and Provost's priorities are at the moment, which definitely makes my life a lot easier." For Sawyer, "There's never been a case where I'm not on [the university committee] or our center's not on it . . . we get to be on the ground with that." Not only did participation seed innovative opportunities while securing budget dollars for many HEDCs, but it also allowed directors to "manage up," allowing their centers' priorities to inspire institution-wide planning efforts.

Second to faculty engagement in planning processes were opportunities for aligning across (i.e., partnering across campus). This was typically nurtured through collaboration and trust-building, often to

avoid redundancy, streamline efforts, save monies, support faculty need, and respond to critical circumstances. Alex's question is apt: "Are we [a] community [or] are we in silos?" Whereas faculty were the most commonly cited planning partners, others were principal or pertinent. Principal partners (described by eight or more directors) included institutional research staff, instructional designers not affiliated with the HEDC, and the Provost's Office. Pertinent partners (described by four or more) included deans, the faculty senate, service-learning officers, Student Affairs administrators, writing center staff, and the President's Office. Lesser-voiced yet deeply valued collaborators included students, health and wellness staff, Title IX officers, international student services staff, and department chairs.

Adapting agilely also meant, for some, pushing against overstructured university planning efforts or having administrators who recommended agile orientations. Jordan opined that while their institution would be "perfectly comfortable with a five-year strategic plan . . . I know that's not effective at all." In fact, they took inspiration from a war veteran who "used to say, 'It's important to have a plan so you have something to deviate from,' and that's absolutely true for us." Remy, who reported to a Vice Provost, shared the extent to which that leader advised a "nimble" approach:

> There might be things that come up in the moment that don't directly relate to the strategic plan, but if they're not done, then we'll be further behind than we would be. So, [the VP is] like, "I'd actually like you not to worry about strategic planning . . . don't use that as your prime goal." Interesting, right? And surprising.

Results Summary

To plan strategically and operationally, directors of HEDCs relied on four intersecting approaches. Centering the faculty voice invited formal and informal means of routinely, deliberately, and authentically engaging their participants in feedback and planning. Directors were

leveraging disciplinary identity, of which there were four signature types (i.e., the scientist-practitioner, the systems thinker, the creative humanist, and the teacher-scholar). Relatedly, their curiosity, creativity, outreach, and collaborations invited trying methodologies on for size. Finally, directors leaned into adapting agilely, by aligning their programming and planning up and across the institution.

Trustworthiness, Integrity, and Limitations

I sought to ensure trustworthiness and methodological integrity (see Merriam & Tisdell, 2016) throughout data collection, analysis, and interpretation. To achieve credibility, transcripts were "member checked" by study participants. Dependability is manifest in an audit trail and reflexive journal, which methodically logged strategies, analytical choices, and questions. To invite transferability, I utilized thick description, using participants' own quotations to elucidate themes associated with lived experience. Inherent limitations of the study include a convenience sample and lack of overall generalizability, yet these standards are atypically associated with qualitative inquiry. Nevertheless, the results and discussion provide anchors for additional, ongoing inquiry into not only planning but also HEDC evolution.

Discussion

The results showcase how directors described multifaceted, collaborative planning efforts for HEDCs. Such initiatives, organized under *constantly in flux*, are typified by four themes: *centering the faculty voice*, *leveraging disciplinary identity*, *trying methodologies on for size*, and *adapting agilely*. Importantly, directors viewed operational (i.e., short-term) and strategic (i.e., long-term) planning as interchangeable or inseparable. This section discusses implications and

recommendations not only for staff working within or developing HEDCs but also for the systems of support encompassing educational development work.

Faculty at the Center

HEDCs thrive when faculty voice is at the center of all planning efforts (Thompson, 2017). This may be episodic, like involving instructors in one-shot planning meetings or garnering routine input through surveys. More robust are opportunities (e.g., advisory councils, fellowships) that invite faculty across colleges, disciplines, and ranks to advise planning, implementation, and assessment in ways that model action research approaches and inspire ongoing engagement (Antheil & Spinelli, 2011; Immordino et al., 2016; Kogler Hill et al., 2009). With faculty at the center, sage directors also engage tactically and transparently with administrators and university partners.

Notably, arriving at holism and centering faculty voice are symbiotic for HEDCs; faculty voices herald innovative ideas while novel initiatives enrich and expand centers' participant pools. Center staff are advised to ruminate on the depth and breadth of faculty engagement in planning, also considering how instructors are recognized for their contributions. A useful exercise entails penciling multiple concentric circles, then envisioning and comparing the efforts of faculty in the inner circle (e.g., weekly contributors, program deliverers) to those in outer circles (e.g., episodic, or infrequent, contributors to planning). Attention to faculty diversity and heterogeneity—social location, rank, department, etc.—is likewise integral in building authentically responsive holistic programs with and for constituents.

Agile, Leaderful Planning

In sometimes surprising and unanticipated ways, directors' educational and disciplinary perspectives guided agile, leaderful planning approaches. To ignite and sustain planning efforts, each interviewee

pulled liberally and strategically from their respective identities as scientist-practitioners, systems thinkers, creative humanists, and teacher-scholars. Harnessing their experiences to plan agilely was often a reflexive act; absent widely available HEDC planning frameworks, many drew creatively and systematically from instinct or expertise. Their ultimate aims paralleled Dooris et al.'s (2002) assertion that planning, which goes "beyond the grids, scorecards and matrices . . . concerns an ability that is awakened by the human appetite to better our condition" (p. 5).

Regardless of approach, their work was distinctly leaderful. Collective, concurrent, collaborative, and compassionate, leaderful practice "is based on a democratic ideology that calls for the co-creation of community by all who are involved interdependently in its development" (Raelin, 2011, p. 204). In this way, planning eschews linear, overstructured, dispassionate, or objective undertakings. Hallmarks of deft planning include ensuring broad-based participation from faculty and administrative partners, inviting diverse viewpoints, amplifying others' contributions, learning from mistakes, and experimenting with approaches (e.g., backward design). The latter aligns with Sheffield and Moore's (2023) recent contribution, which details how center staff can mobilize design thinking to "strategically plan to meet the needs of individual faculty members and reflectively plan for the future" (p. 170).

Perhaps ironically, most interviewees admitted interfacing rarely with other HEDC directors. They signaled a desire to learn about others' planning approaches. This suggests layered opportunities for the educational development network. Foremost are occasions to exchange individual narratives and architect agile planning models that elucidate the collective brilliance of scientist-practitioners, systems thinkers, creative humanists, and teacher-scholars. To start, educational development entities can host virtual communities of practice; launch planning-inspired anchor sessions at regional, national, and global sessions; and offer cross-institutional courses similar to those described by Roxå and Mårtensson (2008).

Holism as a Way of Agile Planning

HEDC directors championed efforts that extended from and expanded beyond teaching and learning, in part because they observed the fruits of their centers' holistic programming labors. Indeed, such "wholes" exceed the sum of their component parts (Sutherland, 2018; Zahorski, 2002), enabling ripe cross-campus collaborations tied to institutional needs and global trends. Aligned with Sorcinelli et al.'s (2006) musings, holistic foci and institutional integration conspired. Such a marriage between holism and amalgamation, however, necessitates an agile approach that draws lessons from the planning literature yet departs from structured, stepwise approaches. Blending operational and strategic planning while blurring the boundaries between "doing" and "planning" presents crucial advantages for nimble HEDCs (Dooris et al., 2002).

In lieu of perseverating on which strategic planning model might fit their context, new and seasoned directors of both CTLs and HEDCs might draw inspiration from action research methods (see Antheil & Spinelli, 2011; Eckel & Kezar, 2003; Stigmar, 2008). Bargal (2008) states that action research "is humanistic, it emphasizes the empowerment of its participants, and it is critical" (p. 25). An ideology and methodology, action research approaches data gathering, action, and reflection iteratively while centralizing constituent engagement. Planning for HEDCs is as holistic and integrative as the very efforts, initiatives, and programs being planned. If holistic programming keeps centers relevant, agile planning paves the path to relevancy, inviting adaptation around flux and centering constituent voices.

Future Directions

The literature on planning in educational development is embryonic, which invites collaboration and co-inquiry among educational developers. This study offers a glimpse into the lived experience of planning for HEDCs, illuminating facets that may be further explored and

explained through quantitative, qualitative, and mixed methods studies. To add, this research may inspire HEDC staff to reflect upon and consider their own leadership in ways that are both tied to and separate from their (inter)disciplinary identities and affiliations. Further inquiry into the experiences and outcomes of HEDCs, across both institutional size and staffing saturation levels (i.e., well staffed versus solo- led), offers promise as we consider the ever-shifting contexts (e.g., fiscal, environmental, cultural) affecting educational development.

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Correspondence concerning this article should be addressed to Cara Meixner, PhD, Department of Graduate Psychology, James Madison University, 70 Alumnae Drive, MSC 7401, Harrisonburg, VA 22807. Email: meixnecx@jmu.edu. ORCID 0000-0002-9733-0334.

Biography

Cara Meixner is Professor of Graduate Psychology and former Executive Director of the Center for Faculty Innovation at James Madison University.

Conflict of Interest Statement

The author has no conflict of interest.

Data Availability

The data reported in this manuscript are available on request by contacting the corresponding author.

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