© *Journal of Higher Education Outreach and Engagement*, Volume 20, Number 1, p. 35, (2016)
 eISSN 2164-8212

Original article citation:
Lynton, E. A. (1996). Ensuring the quality of outreach: The critical role of evaluating individual and collective initiatives and performance. *Journal of Public Service and Outreach, 1*(2), 16-22.

Ensuring the Quality of Outreach: The Critical Role of Evaluating Individual and Collective Initiatives and Performance

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This spring, leading scholars eloquently described the societal need for a more intense and direct engagement of universities with their external constituencies.[1] There is no need to elaborate. But it might be useful to mention, as well, the internal benefits of outreach, and to point out that strong faculty engagement in outreach is needed by the university as much as it is by its societal partners.[2]

New knowledge is created in the course of the application of outreach. Each complex problem in the real world is likely to have unique aspects and thus it requires some modification of standard approaches. Hence, each engagement in outreach is likely to have an element of inquiry and discovery, leading to new knowledge. The flow of knowledge is in both directions. First-hand faculty involvement in the field provides new academic insights and understanding, which provide new directions for controlled research in laboratories; findings, in turn, lead to ideas that can be brought to the place of application. That interplay and mutual reinforcement of theory and application has traditionally been a strong characteristic of the interaction between schools of agriculture and their external constituencies.

Thus, outreach is needed for the optimal generation of knowledge. And for the same reasons—because it is a source of new insights and understanding—outreach is also of great importance, indeed essential, for many of the instructional tasks of the university. It provides bridges between theory and practice which benefit the teaching and learning process both directly and indirectly. Direct student involvement in faculty-outreach projects has the

potential of providing considerably more mentoring and learning than an external experience in which faculty are not engaged. And, faculty outreach indirectly benefits all other students.

That is a given, for example, in the health professions, where it is unthinkable to provide professional degrees without clinical faculty. Imagine medical training consisting of four years of: classroom and laboratory instruction by faculty without any patient-care experience, followed by a number of months of "practice doctoring." Ridiculous—yet we all recognize that pattern as prevalent in a number of other professional schools that pay little attention to the extent to which faculty are knowledgeable about the applications of theories they teach. In view of the fact the great majority of individuals who graduate from professional schools will become practitioners, the quality of their education is much enhanced by faculty with an understanding of practice as well as theory. It is not essential that faculty themselves have been practicing journalists, lawyers, or farmers. But it is of great pedagogical value for faculty to have had direct involvement in outreach projects, working collaboratively with practitioners in analyzing and remedying problems and developing new approaches, thus acquiring first-hand knowledge of the field. Such engagement is especially important for professional schools, but also is a great asset in many other fields such as the social sciences; ethics, and applied sciences. Shulman has urged that "public and community service [be viewed]… as a clinical component for the liberal arts and sciences."[3]

Thus, outreach is of great importance to the university as well as to society. It is in the institution's self-interest to ensure substantial engagement in outreach by appropriate departments and colleges.

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In no academic institutions are both the external need and the potential internal benefits of outreach greater than in our urban and metropolitan universities. A growing number of them have declared themselves to be not only in but of the city in which they are located. They see themselves as interactive institutions, responsive to the varied knowledge needs of their constituencies; one result of this interaction was the forma-

tion of the Coalition of Urban and Metropolitan Universities a few years ago.[4]

Outreach is too important to beleft to individual initiative in a university that intends to take it seriously. Outreach must become an explicit part of the collective responsibility and expectations of appropriate colleges, departments, and units within the institution. Within these units, discussions must lead to a deployment of available faculty resources to ensure that the unit carries out its multidimensional task of teaching, outreach, and research in an optimal fashion, with an optimal match between individual preferences and collective needs.

Of course, some schools and departments will be engaged more heavily in outreach than will others. And within a unit, even one with substantial outreach responsibilities, there will be, quite properly, variations among individual faculty members' activities, reflecting their differing interests and capabilities. Flexibility, both in unit expectations and in individual assignments, is both necessary and desirable.

Essential to that kind of flexibility is *equivalence of recognition and rewards*. Different units within an institution can assume different responsibilities only to the extent to which each of these is deemed of equivalent importance and value to the institution, and rewarded in an equivalent way. And that, of course, holds equally for individuals: there can be variations in the profile of their activity with regard to research, teaching, and outreach only to the extent to which the entire range is given equivalent recognition. Or, to put it negatively, as long as research is viewed as the paramount measure of both collective and individual esteem and advancement, an institution will lack the flexibility of deploying its resources in an optimal fashion to meet its multi-dimensional and complex mission.

But that equivalence of recognition and reward is possible and justified only under one condition: that there exists, as well, *equivalence of quality*. The freedom, at both the individual and the collective level, to concentrate on different portions of the range of activities within the triad of teaching, research, and professional service, can exist only to the extent to which work of any kind within that range is held to equivalent standards.

Hence, everyone who advocates greater university emphasis on outreach must, at the same time, insist that institutions develop ways of documenting and evaluating the quality of external activities. The greater the external and internal needs for outreach, the

greater the importance of quality assurance. At this time, faculty skepticism about the scholarly quality of outreach is a major barrier to its acceptance as an important part of faculty work. Evaluation of outreach must become part both of performance reviews of collective units such as departments, and the reward system for individual faculty members. The collective evaluation of outreach must concentrate primarily on the quality and effectiveness of outreach projects for which the unit is responsible. In the case of individual scholars, the evaluation is the more subtle and complex task of ensuring that faculty outreach indeed constitutes what Boyer calls the *scholarship of engagement*.[5]

It is worth noting that outreach does not have to be scholarly in order to be of value. A university can be of great utility to its external constituencies with many kinds of routinized services, from soil testing at an experiment station and standard surveys carried out by a University Survey Center to the dissemination of informational material and training sessions in certain skills provided by a variety of units. Typically these can be carried out by technical staff according to standard protocols, with little or no ongoing faculty input and supervision. Many such technical services now exist and most should continue, either *pro bono* or on a fee-for-service basis. Indeed, in the aggregate they may well constitute the largest component of university outreach in terms of individuals reached. Because of their repetitive nature, most of these services could be, as one says in the current jargon, equally well "outsourced" to non-academic providers who have, in fact, begun to muscle into the universities' traditional territory even without an invitation. The university's role in this kind of outreach would therefore seem to be valuable but not essential.

But universities are especially, perhaps even uniquely qualified to provide outreach that makes direct use of the professional expertise of their faculty. There is a great and growing need for outreach to tackle problems that are not susceptible to standard approaches and remedies, and cannot be carried out adequately by merely taking a packaged solution off the shelf, repeating what has been done before and ignoring the situation-specific aspects of the current task. University outreach cannot be largely limited to peripheral, non-academic units with little or no faculty involvement. The essential role of universities in outreach is to provide scholarly engagement by the faculty, focusing on activities that pose real intellectual challenges and have substantial potential for creativity and innovation. Providing technical assistance to a small enterprise, developing new approaches to the science cur-

riculum of local schools, analyzing alternative land-use policies for local government, and giving organizational advice to community groups are examples of outreach activities that require the best in faculty professional expertise and can constitute scholarship of the highest order. Such scholarship is not only comparable in its intellectual achievement to the best scholarship manifested in traditional research, but indeed is of a substantially similar natures.[6]

The nature of scholarship derives as much and more from the *process* that is followed than from the *outcomes* it produces. It is manifested by the *why* and the *how* something was done and not only by what was done. Scholarship is a habit of the mind. The scholar:

- analyzes the situation and identifies unique aspects,
- defines the problem,
- sets clear objectives,
- chooses the most appropriate approach,
- reflects on the ongoing process,
- makes corrections as necessary,
- assesses the outcomes,
- draws appropriate inferences to inform future work, and
- shares what she or he has learned.

That list, though worded so as to be specific to scholarly outreach activities, is applicable as well to scholarly research and scholarly teaching with minor modifications.

And the same is true for the *outcomes*, which for outreach can be described in terms of the following components:

- meeting the specific goals of the project,
- enhancing the capability of the client to deal with similar problems in the future,
- obtaining new ideas and insights from the project that can enhance the individual's own outreach capabilities and contribute to the knowledge base of the field,
- having an impact on the teaching and the research of the individual and his/her colleagues,
- benefiting participating students, and
- contributing to the mission of the institution and the individual's unit.

This specific description of the elements of the scholarly process and of its outcomes is somewhat arbitrary. Alternative formulations are possible, with fewer details and different nomenclature. But these descriptions are likely to be essentially equivalent, all indicating the depth of the process and multiplicity of potential outcomes and that any evaluation of an individual's work must go beyond a traditional program evaluation of the outreach project. The effectiveness and impact of the project as such is certainly a substantial component of the quality of the individual's achievement, but does not fully describe it.

The evaluation of an individual's work requires a rich and inclusive documentation that captures the full extent of process and outcomes. Such a documentation is possible by means of a portfolio of pertinent materials, combining an explanatory personal statement with illustrative work samples and products. Each part should reinforce and illuminate the other.[7]

An abbreviated conceptual framework is useful in generating such a portfolio. For example, one might want to group the elements of the scholarly process into three stages: *diagnosis*, *design*, and *delivery*, each to be appropriately documented.

Documentation of the *diagnostic stage* would describe the individual's preparation for the project, steps taken to understand the context and principal characteristics of the situation, theoretical and methodological principles used in defining the issues, and situation-specific elements that require adaptations of prior approaches to similar projects formerly encountered by the individual or reported in the literature. Much of this documentation would be in the form of a personal narrative, but it would also include, where appropriate, diagnostic instruments such as survey instruments and results, protocols for interviews, etc.

The documentation of the *design stage* would describe conclusions drawn from the diagnosis as to the nature of problem, attainable goals, and optimal methods to reach them. It might discuss alternative options for goals and methods, and the rationale for choices made. It would also provide information about the nature and extent of the client's involvement in the process.Included as well would be any available planning documents, initial time tables and work schedules, instructions to participants, and other work samples.

The *delivery phase* could be described in terms of the methods used to monitor and reflect on the progress of the project, with mention of any unexpected developments and an explanation of

what responses these triggered. The documentation could include examples of ongoing sampling instruments, modified project plans and schedules, interim reports, and the like.

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Documentation of *outcomes* would again combine narrative and products. It would include a personal assessment of the *project's impact* on client and students, the individual's other work, and the activities of his or her department or other unit. There should be a specific discussion of new insights gained and how these were *shared and disseminated.* The portfolio would, of course, contain any final reports, and any publications or other written material derived from the project. Last, but not least, it would contain assessments of the work by the client, students, colleagues, and experts in the field. Such assessments could be solicited either by the individual or the departmental or other unit chair, and would be based on a number of explicit questions regarding the impact of the project and its perceived quality from the specific perspective of the respondent.

With adequate documentation it is possible to evaluate the individual's scholarship as manifested in the outreach project. The measures of quality to be applied can again be formulated in somewhat different ways, of which the following is just one example:

- depth of expertise and thoroughness of preparation,
- appropriateness of chosen goals and methods,
- quality of reflection both during and after the project,
- impact of the activity on its various stakeholders, and
- degree of originality and innovation manifested.

A number of institutions have begun to develop methods of documenting and evaluating faculty outreach activities. Some are making use of the American Association for Higher Education Monograph which discusses documentation and evaluation of outreach in considerable detail and provides a few illustrative cases.[8] Others are using a somewhat different but basically equivalent approach generated at Michigan State University.[9] In addition, a pilot project has just been initiated, coordinated by the author, in which a number of faculty members at four different institutions: Michigan State, Portland (Oregon) State, University of Memphis,

and Indiana University Purdue University at Indianapolis (IUPUI) are working together to generate a set of prototype portfolios that might serve as models.

Notes

1. *Journal of Public Service and Outreach,* 1 (1) (1996).
2. Ernest A. Lynton, *Making the Case for Professional Service* (Washington, D.C., American Association for Higher Education (AAHE), 1995), 11-13.
3. Lee Shulman, "Professing the Liberal Arts," Presentation at the First Institute on Integrating Service with Academic Study, Campus Compact, Stanford, CA, July 1991.
4. The coalition's quarterly journal *Metropolitan Universities*, is now In its seventh year. For information, contact Executive Editor Ernest Lynton, Fax No. (617) 566-4383, or Publisher Marylin Mattsson, Fax No. (410) 830-3456.
5. Ernest A. Lynton, "Reversing the Telescope" (presented at the Fourth Meeting of the Coalition of Urban and Metropolitan Universities, Orlando, FL, June 1996), (forthcoming in *Metropolitan Universities*, Winter 1996.
6. Ernest L. Boyer, "The Scholarship of Engagement,* *Outreach*, 1 01: 11-20 (1996)
7. Lynton, *Making the Case*.
8. Russell Edgerton, "introduction," in *The Teaching Portfolio: Capturing the Scholarship in Teaching*, eds. Russell Edgerton, Patricia Hutchings, and Kathleen Quinlan (Washington, A. C.: AAHE, 1991), p. 9
9. Lynton, *Making the Case*.
10. Lorilee R. Sandmann, *Points of Distinction: A Guidebook for Planning and Evaluating Quality Outreach* (East Lansing, Mich.: Michigan State University, 1995).

About the author

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