**Benchmarking University Engagement: A Conference on Strategies and Methods**
**Michigan State University**
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**Panel II: "The Importance of Engagement Data and How They Can Be Used"**

**Transcription of the Remarks of Alexander C. McCormick,**
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Good morning. I'd like to begin by expressing appreciation to Hi Fitzgerald and Diane Zimmerman

and their staff for putting together a really interesting conference. I think there are a lot of very

valuable conversations going on here. I also want to thank Bob Church because I've been puzzling

over a lot of these issues since about 2000, when he and I served on a panel at a UCEA meeting. He

and the others' presence really enriched and problematized my understanding of this constellation of

activities that we variously call outreach and engagement or service.

A quick roadmap to my comments: First, why is the Carnegie Foundation interested in this, and how

does it connect to the Carnegie classification that you may already be familiar with? Then I want to

talk specifically about the fact that specifying and documenting indicators of engagement activity is

going to be hard work, so why are we doing it? Why do we want to do it? What will result from

benchmarking or classifying engagement activity? Then I want to conclude, if I have time, by getting

into some specific challenges that we face in identifying indicators to represent institutional

engagement with community.

When we talk about the Carnegie classification—and if you don't know Carnegie classification, you

probably do know Research 1, the term that was sort of emblazoned into the vernacular of higher

education in 1973 and that has been a part of the classification until 1994. We did away with it in 2000.

That doesn't stop people from using it because it's very much a part of our culture and how institutions

like Michigan State identify themselves. There is a whole other talk on the problem of confusing classification and identification, but you'll have to come to another conference to hear that one.

What we want to do is bring some balance into the classification, to extent that the classification differentiates institutions with respect to mission. There has always been a bit of an imbalance. There is some explicit attention to instruction, even if it's superficial, where we talk about degrees and breadth of program offerings and so on. There's been explicit, if imperfect, attention to the research knowledge production mission by looking at flows of support for research from the federal government, and using that as a proxy for research activity.

We've been silent on the other part of the mission that we've been talking about here in this conference. There are a couple of very good reasons for that. It's a slippery concept. It's a wide range of activities. There is no real accepted consensus on what exactly is in and what is not in. More importantly, more to the point, there is no national data on it. The classification is based on secondary analysis of existing national data, primarily from the Department of Education and the National Science Foundation. So in the absence of data or a massive investment in an original data collection exercise, it remains invisible.

What we're doing with the classification in 2005, and this is the tricky part, is moving from a single classification scheme, one that we've had for a little over thirty years now, to a set of independent parallel classification schemes, recognizing that colleges and universities are complex institutions and there are many ways that we can think of them as similar or different. There's a document in your packet that's about a year old now. It's a little bit dated, but it gives you a quick overview of what we really mean when we talk about multiple classification schemes.

To deal, however, with the limits of national data, we're also beginning what we call elective classification schemes. We relax the requirement of having data for every institution in the country, and try to provide an opportunity for institutions with special commitment in areas like outreach and engagement to make the extra effort to document their activity.

It's important to remember what classification is and what it isn't. The classification is not a ranking system, although many interpret it in that way. In fact, it was developed for use by researchers. It was originally created for the "specific use of the Carnegie Commission on Higher Education, and then disseminated for use by others engaged in research on higher education." That's a direct quote from the first classification publication.

Having said those two things, let me say what a classification of community engagement will not be. Some of you heard this in a meeting yesterday. I don't envision us coming out with categories like "Engaged 1" and "Engaged 2" or "Highly Engaged," "Moderately Engaged," "Minimally Engaged," "Not Engaged." Others may well want to take on that activity, but that's not the perspective or the approach that the Foundation is going to take.

Finally, I want to express appreciation for the timing of Amy Driscoll's retirement from Cal State Monterey Bay. We're very fortunate to have Amy taking the lead on this project because she brings a depth of knowledge and experience that is going to be very valuable as the project moves forward.

Okay, now the meat of the take here is what I've called "The Risks and Rewards of Documenting Engagement." A subtitle might be "The Power and Peril of Defining and Naming and Classifying." So why do we do this? It's going to be hard work. You wouldn't be here if you didn't already have at least an inkling of an answer to the question, but let's think it through a little bit.

What we all know is that in doing this we bring attention, we bring legitimacy, we bring the promise or hope of further support and resources to this activity, and we might also think that it's going to promote institutionalization within our institutions and, perhaps, even wider adoption throughout higher education. It enables us to respond to demands for accountability and relevance. Accreditation is certainly one of these areas, and the revision of the North Central standards is a convenient example. It gives us a language for explaining how higher education benefits society in concrete ways. It also helps us to reinvigorate and exemplify the notion of the land grant university. As suggested in some of the materials that we got early, it "enables us to move from anecdotal to empirical data."

I don't want to ignore, though, that there are also some personal rewards involved here. That is, intrinsic rewards of feeling like you can actually show what your institution is doing. There may be a career development angle here, too. You might feel like you want to be president of an institution that has these commitments, or move on and take a leadership role in the field. That's not inconsequential at all. I think those are meaningful motivators in what drives our institutions to distinguish themselves and to be better.

All of that sounds great, so what's the downside? Well, I think it is going to require significant effort on the part of institutions and institutional personnel: you. I think the likelihood that this will replace other work, that is, substitution versus being an add-on, is probably low. So, it means extra effort. There are some very stressed offices, institutional research offices, that are already breaking under the burden of external reporting demands. If it falls to outreach and engagement units, then there is a question of whether it will require diverting effort from core activities. Another consequence is that it may require modifying local definitions and a data collection effort to conform to some sort of national standard. That may be a bitter pill to swallow for some institutions, to have to make the choice between

an authentic set of data that makes sense in the local context, that perhaps allows you to benchmark against yourself over time, versus being able to benchmark and make comparisons against other institutions.

Now, what's going to be the result of this work? What are possible outcomes? I've already reviewed a lot of the positive outcomes. Let's think, however, of what are some unanticipated consequences. First, we do have to engage in defining and naming, and that means at some point—and it's going to be, I think, very hard to do here—we have to identify a list of activities that we're going to label "engagement" or "engaged scholarship." And what does that signify for the activities that are not listed? Keep in mind that activities might not be listed because those doing the defining and naming have decided that those activities are not in, they don't count in this category of activities, or it might also be because they qualify but they just can't be measured or documented satisfactorily. Our experience with classification is that defining and naming are very powerful activities. They have important symbolic content, and they shape the behavior of individuals and institutions in ways that often cannot be anticipated.

Richly contextual information works well when the number of cases is small, but as more cases are brought in, that is, more institutions, we face a lot of pressures to standardize, to quantify, to take information processing demands into account and hear the contrast of case study versus large scale survey. Our current Carnegie project enables us to have a substantial case study approach, but sometimes I worry about what's going to happen if this takes off, is a big success. How are we going to adapt to meet the demands?

As suggested in some of our conversations, standardization is inimical to local conceptions and adaptations. I think there's a special challenge in this constellation of activities. Reification is always a

problem, confusing the measure with what it is intended to represent, and there again in the classification we've seen a lot of institutions chasing the measure, rather than being more mission-driven in deciding how they're going to allocate their attention and resources.

Finally, defining the data elements carefully and strategically is really important. This brings to mind some quotes from yesterday: "What's gets counted counts and we'll get what we measure." Here again, the Carnegie classification and also the *U.S. News* experience is telling.

Let me wrap up with what I think are some specific challenges before us. First of all, we need to invest some effort in framing this work and answering the question of what is the problem that we're trying to solve. After doing that we'll have to identify and choose among our competing interests and priorities and preferences. Here I'm not talking just about sponsoring organizations, but also units within institutions and individuals. I sense a little reluctance, and I think it's understandable, to confront and grapple with those questions, but avoiding them is going to make it difficult to reach consensus on the details.

There are other groups that have been involved in this: the CIC, the NASULGC-CECEPS group, Campus Compact, and Carnegie Foundation. We have related and overlapping interests, but they're not the same interests, and I think it will be important to identify the points of overlap, points where we can help each other and leverage one another's work, and then points where we're going to have to forge ahead on our own because of our different interests.

Here, I think, related to this, we have to separate the concepts of benchmarking, classification, and ranking. We all have common interests in promoting documentation, but what we're going to do with that information may diverge.

As I suggested earlier, the array of activities subsumed under engagement is really broad, and we face some challenges in defining this. If we include all of them, then do we dilute what we mean by the term, but then as we narrow do we alienate some important constituents and stakeholders? Either direction, actually, can alienate some of the faithful. There is a question of who decides? Who's the arbiter? Who gets to make that decision? That may be solved, in part, by having many groups doing it, but it still is, I think, a real problem. The Carnegie Foundation, again, is somewhat uncomfortable with the authority that has been attached to us in telling the world what Michigan State University is and what Michigan State's mission is, for example. Can we design a framework that will accommodate growth and development? Can it be organic to accommodate new definitions?

There are a number of measurement issues that I'm going to skip over because I don't really have the time. I'll just mention one, for which I use the technical term "lumpiness." What do you when you want to create a measure at the institutional level, but in fact there may be great variation within the institution, within units, or across units in the extent of these activities?

I will skip over the problem of response burden. I suggested that before. We do need to deliver a system that is going to be practical and usable, and is not going to be an unfair burden on institutions.

Here, I think, what we need to be really selective about is the measures. It's easy for this to turn into a list-building exercise, and then you end up with a list that will just collapse of its own weight. I would recommend being very selective about the measures and grading them on two scales: validity and practicality, that is, ease of implementation. If it doesn't pass both tests, then I don't think it should be pursued.

A final important point is distinguishing among activity and quality and outcomes. My personal belief is that we're at the very early stage of this work, and that simply identifying and documenting and quantifying engagement activity will be a huge stride forward. I think we take a lot of risk by building into it, feeling like we're at the very front end. We also have to have explicit quality measures, and we also have to have explicit outcome measures. Keep in mind, quality is going to create winners and losers, and it might undermine commitment to the enterprise. Why should you be investing all of this extra effort to come out looking not too great, compared to some of the other institutions? The interest in outcomes and impacts is understandable, but I don't think this is the time to take it on. I think we should be taking baby steps. As I say, if we build in too much at the front end, we may be in trouble.

I don't mean for this to sound negative. I was reviewing my notes early and I though, "Oh, it sounds like I'm really complaining about all of the limitations of this enterprise." That's just the consequence of me spending all of this time on the Carnegie classifications. I think this is an enormously promising development, and my only concern is that we try to do too much and that we've got limited resources and limited goodwill to drive the effort.

Thanks very much.