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Strategic Action: Community Engagement Professionals as Institutional Change Leaders

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Abstract

This research study analyzed the role of CEPs in strategic planning processes by examining the use of the civic action plan *(Campus Compact, 2018)*. To ascertain whether institution-wide planning efforts around civic and community engagement create new opportunities for CEPs to take on institutional leadership roles, we interviewed CEPs who were involved in creating civic action plans at their campuses and examined their role in plan development, the competencies most utilized in that process, and the most important support for building competencies and framing the change process. These interviews gave new insights into how strategic planning processes have contributed to the growth, development, and elevation of the role of CEPs on campus and the types of support structures they found valuable. The conclusions will inform future planning work by CEPs and support for that work by organizations. We make preliminary recommendations for change, process accountability, development, and future research.

Keywords: community engagement professionals, higher education, strategic planning, change agents

Introduction

Community engagement professionals (CEPs) are beginning to receive recognition in higher education as a class of professional staff dedicated to building community and campus partnerships in a variety of ways that contribute to institutional and community goals *(Dostilio & McReynolds, 2015; Jacoby & Mustascio, 2010; McReynolds & Shields, 2015)*. Although the field is beginning to learn more about the meaning of this professional role and how to best support it, there is still little known about how these professionals influence the strategic direction of institutions. Indeed, there is still less known about whether institutions are developing strategic directions for community engagement at all.

In 2016, Campus Compact, a national organization dedicated to advancing "the public purposes of over 1,000 colleges and universities by deepening their ability to improve community life and to educate students for civic and social responsibility" *(Campus*

Compact, n.d.), sought to increase the level of strategic planning taking place around civic and community engagement through the civic action statement and planning process. College and university presidents from across the country signed onto the statement, committing to create a public civic action plan for the respective institutions. Several colleges and universities have now completed and shared these plans online. Researchers sought to use this initiative to find examples of institution-wide strategic planning for community engagement to examine the role of CEPs in the process.

This single case study includes five examples of CEPs' engagement in and leadership of strategic planning. The purpose of this case study is to provide insight into the role of CEPs, including the skills, abilities, and knowledge they used in the strategic planning process and the factors that most contributed to their competency in these areas. The presentation of the case study is followed by an analysis of themes and trends and a discussion of what these findings might mean for the field of higher education community engagement in terms of how it supports professionals and their development and encourages institution-wide planning efforts.

Literature Review

CEPs have been on college campuses for quite some time, but the field has had challenges in defining their role and identifying competencies that make the professional. Dostilio *(2017)* defined CEPs as "professional staff whose primary job is to support and administer community–campus engagement" *(p. 1)*. These individuals build relationships with almost every constituent on campus and in the community. In the case of building strategic plans for these efforts, they may be trusted with strategic leadership and serving as organizational managers *(McReynolds & Shields, 2015)*. They lead colleagues in assessing current practices while striving to be institutional change leaders.

Strategic planning is instrumental to a CEP's role *(Dostilio, 2017)*. Strategic planning can be defined as "a deliberative, disciplined approach to producing fundamental decisions and action that shape and guide what an organization (or other entity) is, what it does, and why" *(Bryson, 2018, p. 8)*. Higher education engages in strategic planning to continue to meet the demands of higher education in new ways *(Lerner, 1999)*. The changing demographics, decline in federal and state dollars, and new educational models are examples of why it's necessary for institutions to be strategic in their planning and to consider new approaches. Strategic planning

provides an avenue for universities "to adapt to the rapidly shifting environment" *(Rowley, Lujan, & Dolence, 1997)*. This form of planning includes conducting an environmental scan, a gap analysis, and benchmarking to set goals *(Lerner, 1999)*. Whereas conventional planning puts an emphasis on immediate problems and their solutions, strategic planning involves forward thinking. Strategic planning provides a platform for campuses to analyze their current operations, outline their vision for the future, and create strategies and pathways that align with future aspirations *(Rowley et al., 1997)*. The kind of thinking and planning needed to address the campus of the future creates deeper and more meaningful levels of change. The strategic plan becomes a guide for organizational decisions *(Lerner, 1999)*.

There is very little information about institutional strategic planning for community engagement or the role of CEPs in that process. Despite the multiple ways in which CEPs are expected to assess programs that require skills such as tracking, documenting, and evaluating, there is little reference to the actual training and development of CEPs to prepare them for this work *(Dostilio, 2017)*. McReynolds & Shields *(2015)* argue that CEPs must have the skills to evaluate the institution and collaborate with others in order for community engagement to be institutionalized on their campuses, but there is little reference to where the CEP might develop these skills essential to their work. CEPs are often expected to conduct assessments on campus for program reviews, awards, and other recognition programs such as the Carnegie Classification in Community Engagement.

When reviewing the competencies included in the preliminary competency model *(Dostilio et al., 2017)*, the following knowledge, skills, dispositions, and critical commitments are well-suited to support strategic planning *(pp. 46–51)*:

- Knowledge of assessment and evaluation methods; able to assess and evaluate impact of community engagement on its stakeholders (e.g., students, faculty, communities, institution)
- Knowledge of community-engaged pedagogies, including history, methods, underlying theories, and community challenges that may be addressed through community-engaged pedagogies scholarship
- Knowledge of context: of self, of institution, of environments external to institution, of history of engagement

- Knowledge of institutional policies that may affect community engagement (e.g., faculty handbook, student handbook)
- Able to collaborate and work across role and disciplinary silos (skill)
- Able to cultivate and maintain relationships (skill)
- Able to collect and analyze data (skill)
- Able to assess and evaluate impact of community engagement on its stakeholders (skill)
- Able to communicate effectively (skill)
- Embrace critical thinking (disposition)
- Embrace visionary thinking (disposition)
- Committed to dialogue with communities (critical commitment)
- Able to unveil and disrupt unequal power structures (critical commitment)
- Able to recognize one's subject position in connection to privilege and oppression (critical commitment)
- Able to name injustices and power differentials (critical commitment)

Dostilio *(2017)* found that a CEP must have administrative knowledge, skills, abilities, and dispositions that are developed at a higher level to work with multiple constituents to advance this work. In this case, strategic planning was not addressed specifically, but assessment and relationship development and critical thinking skills were included. Strategic planning, assessment, and analysis are essential for a CEP to move their campus to a higher and more significant level of engagement. Additionally, McReynolds and Shields *(2015)* suggested the development of an assessment committee as one way that CEPs can start to map out their institutions' impact and develop strategies for moving their programs forward.

Resources are available to help guide institutions and CEPs in creating strategic direction, such as Furco's *(1999)* self-assessment rubric for the institutionalization of service-learning and Holland's *(1997)* matrix of institutional commitment to service. However, to date there has been limited comprehensive guidance on how to create a strategic plan for community engagement. In 2016, Campus Compact asked member campuses to reaffirm their commitment to community engagement by having presidents sign on in support of their Thirtieth Anniversary Action Statement. The

statement also committed leaders to creating and sharing a plan: "Our Civic Action Plans will state the actions our campuses will take as we move forward with a renewed sense of urgency, along with the impacts we expect to achieve" *(Campus Compact, 2016, para. 15)*. As of August 2018, 110 of these plans had been submitted and shared publicly on the Campus Compact website *(Campus Compact, 2018)*.

Study Context

Since the Campus Compact Thirtieth Anniversary Action Statement's creation, more than 450 college and university presidents and chancellors have signed onto the statement. Of these, 110 (or about 25%) have submitted completed civic action plans to a publicly available database on the Campus Compact website at compact.org.

This is not the only initiative for strategic, institution-wide community engagement, and there are certainly other ways institutions have chosen to create strategies for these efforts. This is, however, the largest publicly available database of such plans. For this reason, it served as the main source of information for this study. Researchers reviewed these plans, looking for those that identified a planning team that appeared to include at least one individual who might be a CEP. Researchers then sought to find willing study participants from among these professionals who represented a range of institution types and geographic locations.

Methods

This research utilized a case study methodology *(Yin, 2002)* to understand the role of CEPs in supporting and leading institution-wide strategic planning. The researchers aimed to characterize the knowledge, skills, abilities, and dispositions of the CEPs that supported their ability to participate in the strategic planning and to describe how those competencies developed during their career. Qualitative inquiry and the use of a case study method was most appropriate, as this research design focuses on complexity and helps advance the understanding of people and programs, supporting focus on a unique interest *(Stake, 1995)*. Glesne and Peshkin *(1992)* stated,

> The openness of qualitative inquiry allows the researcher to approach the inherent complexity of social interaction and to do justice to that complexity, to respect it

> in its own right. Qualitative researchers avoid simplifying social phenomena and instead explore the range of behavior and expand their understanding of the resulting interactions. Throughout the research process, they assume that social interaction is complex and that they will uncover some of the complexity. *(p. 7)*

Yin *(2014)*, Stake *(1995)*, and Merriam *(2009)*, the three seminal authors of case study research *(Yazan, 2015)*, outline the uses and methodological characteristics of this methodology, noting that it allows for focus on a particular case, recognizing the complexity of what is being studied and the need for descriptive analysis. Yin *(2002)* outlines four types of case study design: single holistic design, single embedded design, multiple holistic design, and multiple embedded design. This research is a single-case design embedded in multiple units of analysis *(Yin, 2002)*. This single-case study examines five examples of the CEP's role in the development of a civic action plan at a variety of institutional types and geographic locations. A study that is embedded involves more than one unit of analysis. Yin *(1989)* states, "For example, even though a case study might be about a single public program, the analysis might include outcomes from individual projects within the program" *(p. 49)*. This case study describes the development of civic action plans and the knowledge, skills, abilities, and dispositions of CEPs in supporting and leading institution-wide strategic planning. The units of analysis are the CEPs located at multiple institutions.

Five CEPs each participated in an interview lasting between 45 and 90 minutes. The institutions represented by the participating CEPs included both public and private, associate's, baccalaureate, master's, and doctoral institutions, from the Northeast (2), Southwest (1), and Midwest (2) regions of the United States. Each participant was sent an e-mail from one of the three researchers asking them to participate in an interview to discuss their role as a CEP in the civic action plan and institution-wide strategic planning. The researchers communicated via Zoom software, recorded the interviews, and took notes for analysis. Prior to recruiting the participants, the researchers received Institutional Review Board approval for the project. The Results section describes each of the examples, outlining each CEP's career characteristics; the process for developing the civic action plan; the knowledge, skills, abilities, and dispositions utilized in the process; and how the CEP's participation in this process supported institution-wide strategic planning.

Results

Community Engagement Professional 1: Associate's College in the Southwest

The CEP at this institution has spent the 7 years of his career in the field of higher education community engagement and currently directs a center for service-learning at a community college in the Southwest United States. In that role, he has administrative oversight over the center and its collaborations with community relations and engaged learning. The center is located within the student affairs division and oversees student food insecurity initiatives, including food pantries and community gardens.

Process. At this institution, presidential leadership served as the catalyst for the civic action planning process. The president signed onto the statement early and then tasked two senior leaders within institutional effectiveness and the provost's office with conducting a process. These two leaders then convened a small group with broad campus representation that served as the core working group. In addition to existing key roles for community engagement, this team also included public relations staff and the faculty senate president. Over the year-long process, this group met once or twice a month to discuss work on the plan. In between meetings, members of the group convened various stakeholders for dialogues, individual meetings, and other modes of discussion. Existing councils were used as a vehicle, along with other means of reaching all relevant stakeholders.

The CEP served three distinct roles in the planning process. The first was securing and administering grant funds that supported an on-campus dialogue series to gather input for the plan. The second was serving as a champion for including community voice in the plan's development and in the plan's goals, including a specific goal of "exploring the impact" of the college's efforts on communities. Finally, the CEP took responsibility for writing pieces of the plan and engaging stakeholders.

The CEP described the main challenges of the plan process for himself personally and the process at large as working to deliberately create democratic processes to achieve "democratic outcomes." This meant setting aside existing ideas and agendas and remaining open, transparent, and inclusive. This was not always easy to achieve within an existing college structure that prioritized other modes of moving agendas forward. It also meant balancing

relationships with personal agendas to ensure the process led to stronger connections rather than creating factions.

Overall, the CEP saw the process of creating the plan as successful and worthwhile. He mentioned that it "got senior administrators talking about reciprocal community partnerships." He believes this will have long-term implications. He also attributed the team's success to the strength of existing relationships in the core working group that allowed disagreements to be discussed with respect and result in good outcomes. In addition, the plan has led to greater investment in community engagement infrastructure, including a new staff position in the center to handle coordination functions.

Although the plan was created as a part of a standalone process in response to the civic action statement commitments, it did align and integrate with the institution's existing mission and vision. It also integrated with an existing conversation about prioritizing high-impact practices and gave more depth to those conversations. Finally, the institution is now beginning a new overall strategic planning process that this plan will help to inform.

Competencies. In general, the CEP felt that nearly all the competency knowledge, skills, abilities, and dispositions in Dostilio et al.'s 2017 preliminary model were relevant to his role in the strategic planning process. One exception is that the college's plan does not, at this time, emphasize curricular engagement, so competencies in that area were less relevant to this process.

Of all the competencies outlined by Dostilio et al. *(2017)*, the following were most utilized by the CEP in the development of the plan:

- Able to communicate across boundaries and roles; between internal and external stakeholders
- Knowledge of democratic engagement and ability to enact a democratic engagement orientation (participatory processes, co-creation of knowledge, co-planning, inclusivity, etc.)
- Able to advocate for community engagement and communicate its value, vision, and goals in your context

Of the competencies listed, the most relevant was the ability to facilitate a truly democratic process that was not completely centered on the institution and kept community needs at the forefront.

The CEP was well equipped to lead that effort and felt a better plan was created because of his advocacy for those process elements. In addition, his deep understanding of community engagement research and best practices allowed him to build the understanding of others involved, particularly senior leaders.

Mentors were key to competency development for this CEP. He has cultivated relationships both locally and nationally across the field. Many of these were facilitated by conferences and other gatherings convened by organizations such as Campus Compact and the International Association for Research on Service Learning and Community Engagement (IARSLCE), including statewide events and graduate network programs.

Professional development opportunities were also vital, including opportunities to participate in national research conferences and attend national conferences and forums. Formal education also played a role, beginning with undergraduate education at an institution in the Midwest with a service-learning requirement that sparked initial interest, then a graduate program in community leadership. The CEP is now pursuing a Ph.D. in community engagement in higher education that continues to add to his knowledge, skills, and connections. Coworkers and prior work experience played a smaller role but contributed to a trusting work environment that allowed him to learn on the job in some situations.

Community Engagement Professional 2: Private Liberal Arts College in the Northeast

This CEP has more than 30 years of experience in a variety of related roles for an elite private institution in the Northeast. This included leading the creation of a Campus Compact affiliate in her state and serving for a time as the director of that organization in addition to her on-campus role.

Process. In many ways the CEP served as the catalyst for the process. She brought the civic action statement to the president and sought support. From there she formed the initial committee, which consisted of representatives from career services, faculty, curriculum, and institutional research. Among this group were two other individuals with a great deal of community engagement experience in other roles with outside organizations. This group decided together to place a greater emphasis on keeping the group small rather than including broad representation directly. Three of the working group members attended a Campus Compact training event on civic action plan creation.

The group spent much of the fall that year creating an inventory of existing efforts and gaps within the civic action statement framework and gathering information. The small group then sought other input through focus groups and other conversations with students, community members, faculty, and other staff. Specific outreach was made to include president's office staff, as well as faculty from a program on campus that has an existing community engagement requirement.

When the CEP convened the initial planning group, she had hoped to expand it at some point; however, based on past experiences, the group felt strongly that too large a size would hinder their progress. Although the group size worked in some ways, the CEP was also concerned that it contributed to a lack of representation from all relevant voices. It was also difficult at times to keep the group on track; furthermore, although the president was supportive in symbolic ways, senior leaders were not engaged in the process.

As mentioned above, the working group, although small, included several individuals with deep knowledge of community engagement, which was a significant asset. Group members were able to bring new ideas on cutting-edge practices to the table and were able to maintain "high energy, high commitment, and high investment." The group also included a faculty member with deep knowledge and strong commitment.

The CEP felt the process had one weakness: an inability to engage the campuses' communications staff in learning more or promoting the plan or process. That team continues to not see these efforts as "newsworthy or noteworthy," and even though the group has made progress gaining attention for individual stories, the larger context is not well understood or "covered." This contributed to a possible lack of buy-in from the larger campus community for the plan and its goals.

The conversations, however, have laid important groundwork that continues to have benefits today. Overall, the process expanded buy-in and understanding across campus, articulated very clear goals that involve the center and other partners on campus and beyond, and created strategic directions for the college that include the center.

This CEP has had the opportunity to oversee and participate in other strategic planning processes in her long tenure. These have included several opportunities to create center-specific plans and at least one opportunity to serve on an institution-wide planning

team. However, these two types of efforts have never been officially bridged until now. The civic action plan presented the first opportunity to create an institution-wide plan specific to community engagement. It preceded an institutional process that resulted in the education of students for citizenship being integrated into the larger institutional strategic plan and more connection between community engagement and newer initiatives around social innovation and experiential learning.

Competencies. The CEP had not reviewed the competency model before this conversation and found it very useful. She felt that nearly all the knowledge, skills, abilities, and dispositions were relevant to the strategic planning process. She also thought the model lacked an emphasis on cultural competence and humility and an understanding of international contexts that she thinks is critical. In addition, she saw much greater emphasis on the need to understand faculty roles and pressures than on understanding community roles and pressures and thinks they should be more equal.

Of all the competencies outlined by Dostilio et al. *(2017)*, the following were most utilized by the CEP in the development of the plan:

- Knowledge of democratic engagement and ability to enact a democratic engagement orientation (participatory processes, co-creation of knowledge, co-planning, inclusivity, etc.)
- Able to communicate across boundaries and roles; between internal and external stakeholders
- Embrace diversity among collaborators and promote inclusion
- Able to advocate for community engagement and communicate its value, vision, and goals in your context

The one area where the CEP does not feel equipped in a way that would have helped the process is in measuring impact.

Mentors have been key to the CEP's development, including some of the "early iconic figures of the movement." The CEP appreciated how open and accessible leaders in the higher education community engagement field have been to her and credited those relationships with much of her development and success. Perhaps because she does not have formal education beyond an under-

graduate degree, professional development convenings were key to these mentorship connections and much of her learning about the community engagement field. This included national conferences, statewide events, and other gatherings that allowed for both local connections to neighbors and national connections to peers. "I wouldn't be who I am or do what I'm doing and be able to think in the complexity I think without attending these and hearing and being inspired and feeling invited to contribute to the evolution of this field," she said.

The CEP's campus has also offered professional development and communities of practice that were vital. She also mentioned that being able to send staff to participate has meant they come back with new ideas, and she has benefited from that as well.

Community Engagement Professional 3: Public Master's Liberal Arts University in the Northeast

This CEP has been at her institution for nearly 20 years and, in 2009, started a center for community engagement and currently has a staff of one other full-time person, four who are part-time, and nearly 25 student workers.

Process. The catalyst for the plan was presidential leadership. As a result of the president sending out a campus message of commitment to civic action planning, the CEP felt legitimacy for the development of the plan, and also pressure to ensure it was thoroughly completed. The CEP formed a steering committee consisting of faculty members from across campus with the goal of developing their civic action plan. She did the writing and would then share drafts of the plan for feedback to the steering committee, which met every 2 months. Other than the steering committee, a dean from one of the colleges was also committed to the effort. The dean's support was essential and encouraged others to participate. The plan focused on faculty and faculty efforts, so having faculty buy-in was important.

The development of the plan was launched with a conference to allow faculty to showcase their work related to civic action. It was a great platform for faculty to share what they were doing, "a gateway for faculty to be proud of what they've done" and their work. In addition, attendees were able to get ideas from each other. The invited speakers focused on how this work can be integrated into promotion and tenure. This conference will become an annual event and remains one of the main elements of the plan. Another helpful element was that three of the steering committee members

attended a training that gave ideas for making the plan your own while avoiding prescribing what should be in the plan.

One of the greatest challenges of developing the plan was "getting people to take it seriously" and even getting faculty to think about community engagement and civic action. When people attended meetings, they would be engaged and contribute to the conversation, but there was little to no follow-through except for those on the steering committee. There was an attempt to form subcommittees, but that was not successful. The work was not the responsibility of the faculty and therefore not something that seemed important to the faculty. Faculty were not opposed to the development of the plan but were not always willing to act or get involved beyond attending meetings.

One of the major factors that contributed to the success of the plan was having two faculty members discuss the plan with their colleagues. These two faculty members were very engaged and committed to the process. The CEP felt that if she had done this on her own or tried to get buy-in without these two faculty members leading that effort, it would not have gone anywhere. Also, having the dean's support was extremely helpful and lent credibility to the process. It was also helpful to meet with the provost and the president. They communicated their support and were thoughtful about the process, including making constructive suggestions.

The civic action plan fit with the strategic plan and the mission of the university. The center had not been significant within the university, and now this work has become a strong element of what the university represents. The president is interested in graduates' ability to get a job, with critical thinking, communication, and problem solving central to that focus. Although this goal created alignment, the CEP still believes that "the plan is not going to go anywhere unless I push it." This comment was followed by an example of the planned development of a civic engagement minor. This effort needs to be led and supported by faculty, and if not encouraged by the CEP it is unlikely to happen.

Competencies. The competencies discussed focused on those that surfaced during the development of the plan. This plan focused on faculty; therefore, there was not much discussion about students or programs for students. The three areas most referenced by the CEP included leading change within higher education, institutionalizing community engagement on a campus, and facilitating faculty development and support. There were not many items selected in the other three areas.

Of all the competencies outlined by Dostilio et al. *(2017)*, the following were most utilized by the CEP in the development of the plan:

- Able to articulate connection between institutional mission and community engagement
- Able to advocate for community engagement and communicate its value, vision, and goals in your context
- Embrace the tension between charity and social change
- Embrace passion for and commitment to community engagement

The CEP discussed the challenge of not being a faculty member, commenting that since she was not in academic affairs, faculty "don't care about what I know about pedagogies." Although the CEP believed she had more knowledge than she was given credit for, this was an area where she wanted to find ways to build skills and knowledge about pedagogy.

The CEP stated that she attributed much of her success and skill base in her profession to having a mentor. In addition, attending many workshops and conferences over the years contributed to the development of her competencies, as well as taking on leadership roles such as chairing different groups in professional associations. Because she was the first professional staff person in community engagement at her institution and no one else on campus does this work, professional development opportunities and relationships that contributed to her development were external to her close, institutional network.

Community Engagement Professional 4: Private Doctoral University in the Midwest

This CEP has 13 years of experience in the profession. She started as a national service member and served as a community engagement coordinator at another institution before becoming the assistant director and then being promoted to director at her current institution.

Process. The CEP was the leader of her campus's civic action plan. There was considerable collaboration with a community relations manager out of the advancement office as well as the provost (the CEP is housed in Academic Affairs). There was a committee for the development of the plan; however, a three-person executive

committee did most of the work. In addition, a community engagement council was also involved in the process.

Central to the process was a self-assessment that was conducted before developing the plan. One of Campus Compact's regional offices developed a self-assessment measurement tool and process, which this institution chose to participate in. Those on the community engagement council took a survey based on this measurement tool, they assessed the data, and that information was used to inform the development of the plan.

Concurrent to the planning process launch, the president of the university announced an assessment and evaluation system that would be used in planning, assessment, and decision making for the university. At first, this presented a challenge for those developing the plan, as the president did not want more than one plan in place. However, through conversation the president agreed to the effort, and the plan was embedded into this continuous improvement plan and evaluation framework. Creating a link between these two efforts served as a catalyst for the civic action planning process.

The greatest challenge to this process was overlap in mission between advancement and the community-engaged learning office. The administration embraced the anchor institution model; however, it was not broadly understood that service-learning, community engagement, and the work of the community-engaged learning office fit into that model and thus, at times, "leadership didn't understand it as one mission, and therefore there were two efforts structurally." For the CEP, this often felt like "pushing a boulder up a hill." This situation created tension and the CEP felt isolated and unsupported in her vision. In addition, due to different reporting lines, some efforts were more of a competition than collaboration.

Transparency was ultimately the key to the success of the planning process. Knowing that broad support was needed to develop and implement the plan, the CEP went to the faculty senate and worked closely with the president's staff. In addition, being a good decision-maker helped in this process. People were looking for direction, and this CEP learned to provide leadership to this effort, tell people what action was needed, and respond accordingly if there was disagreement. Finally, taking the time to make the plan "look pretty" was important. This CEP knew that no one else would take on this task and make it a priority, so she took this on herself. The plan was embedded into the strategic plan of the university. Every element of the plan will be measured using the

overall institutional assessment process, which will be critical to long-term success.

Competencies. The CEP listed almost all the knowledge, competencies, skills, abilities, and dispositions as elements that were used in the development of the plan. The area with the most items identified was leading change within higher education. The category from which the least number of items was discussed was facilitating students' civic learning and development. In the other five categories, most of the items were mentioned as being used in the planning process.

Of all the competencies outlined by Dostilio et al. *(2017)*, the following were most utilized by the CEP in the development of the plan:

- Able to articulate connection between institutional mission and community engagement
- Able to cultivate and maintain relationships
- Embrace the tension between charity and social change
- Able to collaborate and work across role and disciplinary silos

The CEP noted that there was not a lack of competency, but issues related to power and the struggles within the university created challenges and a lot of tension. In addition, understanding faculty, their roles, and their reward structure was important. Evaluation and assessment are also essential to the success of this plan and an area for growth with this CEP. The strengths of this CEP included relationship- and coalition-building and inspiring a shared vision. She commented, "I see now that I'm leading culture change."

The CEP named two factors that significantly contributed to the development of her competencies. First, having mentors was essential to success. Although many mentors were mentioned, there was specific reference to the importance of having female mentors and former supervisors who invested in her. In addition, Campus Compact network sessions were valuable and a place where the CEP could be vulnerable, ask questions, and feel supported. Finally, she is currently enrolled in a Ph.D. program, and classes in that program are developing her skills and abilities and making her a better mentor for others.

Community Engagement Professional 5: Public Research University in the Midwest

This CEP has spent the last 28 years of his career in the field and has served the last 10 years in a senior leadership role at a public research university in the Midwest. In this role he oversees and directs a center dedicated to the university's mission and vision for public engagement. The center collaborates with administrators, faculty, staff, students, and community partners in all areas of community engagement.

Process. For this institution the civic action plan came at a time to recalibrate. When the president signed the statement, the institution was at the end of a 10-year plan for public engagement. At the same time, an institution-wide strategic plan was being implemented. Under the direction of the systemwide public engagement council, the CEP convened a group of 38 people to participate in the planning process. Of this group, 20 were faculty, 16 were directors of centers or other support staff, and two were students. The group met monthly and was very engaged. They divided into subgroups based on the plan, and during meetings there was a lot of sharing across these groups. Once the group had a draft, they hosted sessions to gather feedback from constituents and then prepared a final draft. The CEP in this case served as the intermediary between the Council on Public Engagement and the planning group, along with finalizing the plan and bringing it forward to engage stakeholders.

The CEP described the main challenge as navigating the infrastructure and culture of the institution internally. The planning group sought to include various constituents and be sensitive to institutional politics while keeping the process moving forward. The CEP acknowledged that tension occurred over whether to have community members on the action planning group. The group wanted to include their voices but were also cognizant that a lot of the issues were internally focused. Additionally, because they work with multiple communities, they were unsure what communities should be represented and who would be able to speak for them. Community members did question this aspect of the planning process.

The CEP chose to lead the planning process through a scaffolding approach by bringing in a set of structures to look at rather than starting from scratch. For example, the CEP brought the institution's application for Carnegie Classification in Community Engagement and the feedback they were given. This data provided

the working groups with information from which to build their plan. The monthly meetings were work sessions, and at each one the groups were expected to complete specific tasks that the CEP directed. This ensured meetings felt productive to the planning team.

In development of the plan, the institution's mission was kept at the center, with community engagement a demonstrated way to achieve the overall goals of the institution "as a strategy to tackle challenges and enhance the educational experience." Sending this message was an important outcome of the planning process.

Competencies. The CEP felt that he was competent in all the areas but could use additional work in one—cultivating high quality partnerships—because of the challenges with including community partners in the planning process. The CEP also noted that his scholarly experience offered a wider range of context and experience than was available to most CEPs.

Of all the competencies outlined by Dostilio et al. *(2017)*, the following were most utilized by the CEP in the development of the plan:

- Able to strategically plan
- Embrace innovation
- Able to work within the structural constraints of the institution toward social change

Within the list of competencies, the CEP felt equipped in most areas, at least at a basic level. This CEP has strong experience in strategic planning, engaging faculty, and institutionalizing community engagement. The area he saw as weakest was facilitating students' civic learning and development. He has the skills to show faculty how to do this, but he felt a need for support when it came to developing relationships and directly being involved in their learning as a facilitator because he is removed from working with students in this capacity.

The CEP identified coworkers as key to his professional development. He continues to make it a priority to surround himself with people who are passionate for the work. The CEP made it clear that he likes to develop others while being pushed by others. He looks for coworkers who have an authentic commitment, an eagerness to grow and learn, and who are visionary people who do things differently for institutional change and transformative

change. They look at communities differently, which helps this CEP as well.

Discussion and Analysis

In analyzing the findings of this study, researchers sought to explore the CEPs' role in the process and the competencies identified from Dostilio et al.'s *(2017)* model and how they were developed.

Process

Likely due to the source of the strategic plans studied, presidential leadership was a critical catalyst to each case study's planning process. This did not, however, necessarily translate to strong support or involvement in the planning process from leadership. In most cases, the CEP found a way to leverage the process in a way that was helpful to their efforts and had strong linkages to the university's strategic plans or other related planning processes. In this sense, the CEPs themselves were also strong catalysts for carrying the planning process forward and ensuring success.

In each case, the CEP did not write the plan alone. They sought to engage a group of stakeholders. The size and makeup of this group varied and was not always determined by the CEP. These groups required leadership and organization. In some cases, the CEP provided the leadership, and, in some cases, the CEP strategically relied on others whose positions on campus made them more able to influence decision-making. In all cases, the CEP played a strong role in trying to strike the right balance between keeping the process moving forward and effectively engaging stakeholders from campus and the community. Several of the CEPs specifically mentioned the thought process they used in selecting these stakeholders. This included ensuring that those who would be needed for implementation were engaged and served to provide background information and education on community engagement to a broader group.

Whether CEPs engaged stakeholders such as students and community partners depended on the individual context, but, at least in the case of community partners, this seemed to be something the CEPs thoughtfully considered. Only one specifically mentioned including students, but two talked at some length about their efforts to make sure community voices were heard and in one case believed that they did not do enough in this area. This attention to community partner voice may be a key leadership role that CEPs can play based on their unique perspectives and experiences.

The most common challenge cited in the planning process was navigating institutional "politics" and culture. This meant successfully integrating with other efforts and making the case for community engagement as a key factor in achieving institutional goals. It also meant working to keep the planning process in front of people and serving, in some cases, as the main driver for that process.

Competencies

For most of the CEPs the competency model was at least somewhat familiar to them, even if they had not fully read it prior to the interview. Most also believed that many of the competencies were relevant to the strategic planning process and struggled to narrow the list of those most essential to just a few. This demonstrates that efforts like institution-wide strategic planning force CEPs to draw upon nearly all the skills, knowledge, abilities, and dispositions they have built in a variety of ways for success.

As Table 1 demonstrates, however, a few specific areas and competencies stood out when CEPs were asked to choose the top three or four that were most relevant to the planning process.

Perhaps unsurprisingly, the area leading change within higher education had the most referenced competencies. This area focuses on the ability to work with others to create change on campus and even specifically references the ability to strategically plan. Tied for second in the areas most mentioned were institutionalizing community engagement on a campus and cultivating high quality partnerships. Again, these seem to naturally align with an institution-wide strategic planning process. In most cases, the CEP sought to create structures to support institutionalization through the planning process, with one specifically mentioning the goal of creating a civic engagement minor on campus. As for high quality partnerships, this came up frequently. CEPs were thinking about how to include community partner voices and ensure that the process had a strong community impact.

The area least selected by the CEPs was facilitating faculty development and support. This is interesting, because working with faculty and working to institutionalize community engagement in academic affairs was mentioned in several of the case studies. The CEPs were focused on gaining faculty support and engaging faculty as champions for the plan, but perhaps did not need to draw upon their competencies for directly supporting faculty. In addition, it is noted that the CEPs did not hold faculty lines. Although some held terminal degrees, their position in the university was not classified

Table 1. Competencies Most Used by CEPs in Strategic Plan Development

Competency Area	Competency Type	Competency	Times Selected	Total
Leading change within higher education	Knowledge	Knowledge of democratic engagement and ability to enact a democratic engagement orientation	2	11
		Knowledge of one's own personal agency as a change maker	2	
	Skill/ability	Able to articulate connection between institutional mission and community engagement	2	
		Able to strategically plan	2	
	Disposition	Embrace innovation	1	
		Embrace diversity among collaborators and promote inclusion	1	
	Critical Comments	Able to challenge problematic language use	1	
Institutionalizing community engagement on a campus	Skill/ability	**Able to advocate for community engagement and communicate its value, vision, and goals in your context**	**3**	7
		Able to leverage resources and advocate for community engagement as an institutional funding priority	1	
		Able to navigate the institution's political environment	1	
	Critical commitments	Able to work within the structural constraints of the institution toward social change	2	
Facilitating students' civic learning and development	Knowledge	Knowledge of civic learning pedagogies	1	3
		Knowledge of the ways in which students' identities inform and frame their community engagement experience, particularly those students from historically marginalized groups	1	
	Skill/ability	Able to collaborate with and support historically marginalized students	1	

Table continues on next page.

Table 1. Competencies Most Used by CEPs in Strategic Plan Development *continued*

Competency Area	Competency Type	Competency	Times Selected	Total
Facilitating faculty development and support	Skill/ability	Able to customize developmental training and support to fit each faculty member's needs and interests	1	**1**
Cultivating high quality partnerships	Knowledge	Knowledge of local community: history, strengths, assets, agendas, goals	1	
	Skill/ability	**Able to communicate across boundaries and roles; between internal and external stakeholders**	3	
		Able to connect campus and community assets	2	
	Disposition	Embrace passion for and commitment to community engagement	1	**7**

as faculty, which may account for the struggle of engaging faculty. The area facilitating students' civic learning and development was also mentioned less frequently. This may be explained by the focus of the study on strategic planning and not on the activities typically facilitated by CEPs. Although CEPs discussed student involvement in the planning process, students' learning and development was not an area central to this study.

The two most frequently mentioned competency areas were the ability to advocate for community engagement and communicate its value, vision, and goals in your context and the ability to communicate across boundaries and roles; between internal and external stakeholders. Both abilities relate to engaging and communicating with others, which is the core theme from these case studies. These two competencies are central to strategic planning and creating institutional change. Rather than being focused on creating the perfect strategic plan *product*, all the CEPs focused on the strategic planning process. They saw the process as a path to ensure future success, not necessarily because new goals would be written down, but because new people would be more engaged and informed and would understand the connection between community engagement and the institution's mission.

All the CEPs cited mentorship as the way that they had built and continue to develop their competencies. In some cases this meant peers and coworkers; in some cases, CEPs named their supervisors, and in others the inspiring leaders of the field. More than one mentioned the isolation of their role and the value they find in connecting with others with similar goals. One CEP discussed that when among colleagues with similar roles they can be vulnerable and learn, whereas in most cases they must be the expert and guarded. Most CEPs also mentioned professional development workshops and conferences, but, here again, this seemed to be mainly a way of connecting to colleagues and mentors, rather than critical to formal learning.

Some CEPs mentioned formal education both as a way to build competencies and as a means to gain the respect and trust of others across campus. One of the CEPs already has a Ph.D., and two others are in the process of getting them. In each of those cases, they referenced their graduate work and scholarship as key to the development of the competencies used in this process.

Conclusion

This case study provides a critical window into the staffing and leadership required to lead a successful institution-wide strategic planning process for higher education community engagement. In all but one example, the CEP had not engaged in any prior process that was focused on community engagement institution-wide. This demonstrates that the civic action statement and this process of its development served as an important catalyst for campuses to embrace civic action and community engagement and embed this activity into the strategic plan of the institution. It provided a critical platform for CEPs to use; it enabled them to build their skills in this area and allowed them to invite others into the process and create buy-in opportunities for a broad group of stakeholders.

The findings suggest that it is critical for CEPs to develop their ability to manage processes rather than gain specific knowledge. Nearly all of those interviewed focused on the various ways in which they engaged others, navigated institutional politics, and kept the process moving forward as key to their success. All the CEPs discussed mentorship as an important element in building these skills. Mentorship may be important because this information is best delivered through close relationships or because there are few formal professional development opportunities offered in the area of community engagement. Recognizing the importance of mentorship is vital for those seeking to support CEPs and further institutionalize community engagement in higher education. Increasing access to formal peer sharing networks and mentoring programs could be key for future success. In addition, workshops and publications could be offered that specifically discuss how to navigate structures and shape culture. The findings also suggest that although presidential leadership can be a key planning catalyst, staff organization and leadership ensure the process is successful and inclusive.

There are several possibilities for future research in this area. This study was conducted with a limited sample using a case study methodology. A different methodology that leverages a larger group of CEPs could give more concrete findings on the use of competencies. In addition, although the CEPs felt that their planning process was successful, we know little about how these processes were viewed by other stakeholders, including the leadership of higher education institutions. Given that presidents were a strong catalyst for these planning processes, it is important to continue to find ways to understand and support their role as well.

As this study focused on the development of the plan, further study should closely consider how these plans are implemented. At least some of the CEPs expressed concern about their ability to continue the momentum generated by the plan and achieve its outcomes. This implementation phase will require a different set of competencies, and given that the implementation of the plan directly impacts the outcomes of this work, research in plan implementation is suggested. Finally, mentorship was key to the development of the skills and abilities that supported the CEPs in leading this process; however, the conditions that created those mentoring relationships are not well understood. Some CEPs referenced specific organizations and programs, but many did not specify what allowed them to form their mentoring relationships. Without understanding the context of these relationships, it will be difficult to ensure that this type of relationship-building continues to flourish within the higher education community engagement field and among CEPs.

Strategic direction and goal-setting is critical to success and could be a substantial method for further institutionalizing and sustaining higher education community engagement. Finding ways to effectively instigate and support planning efforts is critical, as is building the skills of leaders to take on those roles. From this limited study it is clear that in at least some cases, CEPs are called upon to take on that leadership role, and it's important to consider how to prepare them and their institutions for success.

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