Creating a Shared Understanding of Institutional Knowledge Through an Electronic Institutional Portfolio[1]

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Abstract

After nearly four years of work on developing an electronic institutional portfolio at Portland State University, the authors of this article reflect on how using the electronic medium for such a project can influence institutional self-examination. Viewing the PSU portfolio project as a continuation of the campus's long-held commitment to approaching change as scholarly work, they argue that the electronic medium can lead to new ways of knowing and understanding higher education institutions.

As authors of this article, we are coming together to write about a project to which we bring different histories and perspectives.[2] Nonetheless, through our work on the Urban Universities Portfolio Project (UUPP), together we learned lessons critical to our reflections on the nature of our institution and on the ways in which an electronic institutional portfolio can influence institutional self-examination and self-understanding. At Portland State University (PSU), the UUPP has led to significant, sustained institutional change, while providing a framework for planning for and thinking about change.

Theoretical Frames: Institutional Change as Scholarly Work and a New Epistemology

Our examination of the impact of the UUPP at PSU is framed by two key concepts: the idea that institutional change is a form of scholarly work and the idea that the World Wide Web, as a new medium for conceptualizing and communicating our institutional identity, allows us, as an institution, to know ourselves in new ways. The first concept emerged from the early 1990s revision of general education at PSU that ultimately created our nationally recognized University Studies Program. The story is told on

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campus that then-President Judith Ramaley urged the university community to take a scholarly approach to institutional change in re-envisioning general education—that is, to work toward change by drawing on research-based knowledge and by proceeding collaboratively. She encouraged the campus to establish a culture of self-examination driven by questions, particularly the messy, confusing questions where agreement on the nature of the most pressing issues or most viable remedies is hardest to reach (Yee 2000; see also White 1994 and 1999).[3] The idea of institutional change as scholarly work is useful as we reflect on the process of constructing our portfolio, because it pushes us to move beyond merely narrating the process to articulating and exploring our local, messy questions.

The concept of a Web-based portfolio as a new medium for institutional self-examination and self-understanding developed over the course of our work on the UUPP. It was crystallized at the June 2001 final project meeting in Denver, where one of the project's National Advisory Board members, Gordon Davies, remarked that the electronic institutional portfolio "has become an epistemology." He went on to note that the Web medium offers a new way for institutions to represent themselves that provides a multidimensional view of the institution and the relationships among its various activities. Based on Davies'comment, we will explore the following questions:
- Does the portfolio represent new ways of knowing and learning?
- Has the portfolio increased our capacity to know collectively what we know or need to know?
- Has the portfolio changed the way we construct institutional knowledge and communicate with one another?

We have placed our narrative of the development of the portfolio within these theoretical assumptions or larger questions because we want to understand at a deeper level why we do what we do at PSU and to use theory to analyze our local context.

The PSU Context and Our Critical Friends

The PSU portfolio is a unique product of collaboration among faculty, staff, students, and administrators. By the conclusion of the national project, the campus project team and Faculty Advisory Committee had produced a first-generation electronic institutional portfolio that has gained recognition on the campus and beyond as a model of good practice in involving faculty in institutional initiatives and in using technology to communicate about the institution.

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[3] The faculty committee formed to address general education reform was inspired by the idea of institutional change as scholarly work and agreed that the community would hold itself to the high standard that it expected of the best research. Their scholarly behaviors included studying the work of authorities in the field: more than 20 faculty members on the general education reform committee traveled to a meeting of the American Association of Colleges and Universities and discovered whole bodies of knowledge about student learning and institutional reform. It was agreed that every plan for change at PSU would be integrated with national discussions. In turn, administrators and faculty members at PSU contributed to the body of knowledge on curricular change and institutional transformation.

Annual site visits by "critical friends" over the course of the UUPP were crucial to achieving these results at PSU. During the second semester of each academic year throughout the project, two UUPP Institutional Review Board members assigned to each campus conducted a site visit and provided a progress report to the campus and the national project leadership. Review team members kept in contact with their institutions' project teams throughout the year and periodically reviewed and commented on portfolio drafts. A consistent theme of these reports—for all six campuses, but especially for PSU—was that the portfolios, somehow, were not capturing the essence of the institutions or their focuses and missions. For example, Patricia Hutchings of the Carnegie Foundation wrote that PSU needed to "capture the institutional ethos...something elusive and intangible." Ralph Wolff, Executive Director of the Senior College Commission of the Western Association of Schools and Colleges, remarked that the portfolio "doesn't convey in any way all the excitement of PSU."

Patricia Hutchings urged the project team to explore the "why" questions at multiple levels, from campus-wide mission to specific examples of student learning. For example, why did we choose to pursue community-based learning as a central theme of the portfolio and, indeed, of a PSU education? What is the rationale for this kind of learning? How does it reflect the institution's mission and vision? Why is it essential to achieving desirable higher-order learning outcomes?

After the initial critical friends visit in 1999, as the PSU Faculty Advisory Committee considered how the "why" questions might be presented in the portfolio, they realized that the campus had no existing process for addressing these questions institutionally. The committee had already begun to grapple with issues of planning and assessment in discussions of how the portfolio might serve as a virtual "place" where conversations among the campus community could be carried out and documentation of institutional priorities could be made available to various audiences. But the portfolio could not exist in a vacuum; if it was to address the "why" questions, then the campus itself needed to do so. Addressing this need, in turn, required institutional mechanisms for conducting a civic discourse that would allow the campus community to fully explore the rationale behind our activities.

The persistence of our critical friends in raising the "why" questions helped us to see that, in order to answer them, we needed to achieve institutional agreement and to create processes for doing so. Asking, and attempting to answer, the "why" questions of our critical friends thus pushed us to reflect on our unexplored assumptions and ultimately to adopt a more systematic approach to planning.[4]

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[4] Other factors that encouraged us to plan were faculty members' calls for more clarity about institutional direction, similar requests from external leaders (especially friends of the university), our first capital campaign, and state budget cuts.

Examining Our Purposes as We Articulate an Urban Identity

The task that demonstrated the campus's need to address larger questions was that of articulating our urban identity in the portfolio. One purpose of the UUPP was for the six campuses to collectively define characteristics of urban public universities. As part of this task, the project's campus director invited the provost to write a brief essay for the portfolio on what it means to be an urban institution.

When presented with the initial draft of this essay, the faculty committee, echoing Hutchings and Wolff, commented that it was too abstract, too general, and did not reflect the distinctiveness and excitement of PSU. In a second iteration, the provost described what it means to be *PSU*, rather than just another urban university, attempting to go beyond merely reproducing what other urban presidents and provosts across the country claimed.

That essay evolved into a statement of the provost's vision for academic affairs. It elaborated on creating an institution for the 21st century by defining the idea of a great university as a "real world" laboratory that blurs the boundaries between the classroom and the community; attracts and retains a diverse and distinctive faculty; and emphasizes the development of, rather than primarily the demonstration of, student talent.

At about the same time, PSU's president, Daniel Bernstine, developed an essay, "Vision for the 21st Century," to open the portfolio. Drawing upon PSU's motto, "Let Knowledge Serve the City," to emphasize the interplay of knowledge and the community, he described the "Metropolitan Collaborative Model," an effort to build a university for the next century through alliances with educational, cultural, civic, social, business, and high technology partners. He concluded that PSU would achieve its vision of a great university for the 21st century by fusing the best of academic tradition with intellectual innovation.

When the two essays were shared with members of the Council of Academic Deans, their reaction clearly indicated that they felt little ownership over the statements, even though both reflected ideas that had long been part of institutional rhetoric. The experience prompted the president and provost to realize that the institution would be better served by a shared vision that belonged not just to individual administrators, but also to the entire campus community. Although they recognized that PSU had a history of skepticism about planning, they decided to initiate a new planning process, one that would build on the concept of an electronic institutional portfolio as a virtual place where conversations about the big questions could be held.

Crafting a Planning Process

The planning process adopted in 2001–2002 reflects what the portfolio committee envisioned. A university-wide planning committee, comprising faculty, administrators, staff, students, and leaders in the Portland metropolitan area, began their work by crafting statements of institutional vision and values. Working with drafts of the planning document, the campus leadership began outlining institutional priorities that would flow from PSU's values, vision, and mission. The vision and values statements were reviewed by the campus leadership and by faculty focus groups during Winter 2002. Campus-wide forums, which followed a format similar to that used in the faculty focus groups, were scheduled with other employee groups, including non-teaching professionals and staff. Participants in the focus groups and campus forums were asked to discuss the vision and values that guided their own work, and then to explore the fit between their vision and values and the university's.

A new planning section was created in the portfolio. In addition to housing planning documents, minutes of committee meetings, and other documents related to the process, the Web page includes a discussion board and a first-draft planning tour. In its early stages, the electronic discussion board was open only to members of the planning committee. As the process moves out into the broader campus community, the board has become a communication tool for general discussions of planning priorities and related issues. The discussion board, however, does not exist in isolation. Through face-to-face meetings, campus forums, and other settings, individuals and groups are invited to talk about issues and to follow up with online discussions on the Web site.

Addressing the "Why" Question

At the heart of the "why" questions are unresolved mission issues. The notion of PSU as an urban institution has been around for many years, but the current re-emphasis of the idea dates from the early 1990s and the emergence of a general consensus that the time was right to address not only PSU's identity, but also its marginalized position in comparison to the state's two other major universities. Then-President Judith Ramaley encouraged colleagues to create a new iteration of the mission for the 1990s. It was at that time that our motto—"Let Knowledge Serve the City"—was adopted.

There are distinctions of purpose at work relative to our urban mission and the university's motto. Some faculty members have deep reservations about the motto and see it as conflicting with their disciplinary values and research agendas. Others see it as guiding their teaching and research. Early on, the Faculty Advisory Committee for the PSU Portfolio struggled with how to approach faculty and student activities that were not necessarily "urban," but were related to our purposes as a comprehensive university. Their discussions focused on such questions as these: Should we broaden the definition of "urban" to include traditional activities that contribute to disciplines or to knowledge in general? Does "urban," then, connote a place where all sorts of activities occur? While "metropolitan" may be viewed as a broader and more descriptive term than

"urban," it may, in the eyes of some scholars, refer to a service area more than to an institutional philosophy or approach. In its discussions, the committee thus began to explore "urban" as an idea, a philosophy, and an approach, rather than strictly as a geographic or sociological term. Resolving these distinctions of purpose and mission is our biggest challenge and our biggest opportunity. It is our expectation that the faculty focus groups, community forums, and the Portfolio Planning Discussion List will contribute toward resolution.

The process of creating the portfolio and our new approach to planning have taken us forward in answering the "why" questions for ourselves. If there is one attribute that has characterized PSU since its founding in 1946, as a temporary extension of other universities in Oregon that was established to serve returning veterans, it is our responsiveness (Dodds 2000). We have long maintained a tacit institutional commitment to respond to what the public and national higher education bodies, including those that represent the disciplines, have recognized as necessary for meeting the challenges of the twenty-first century. We believe that Portland State University has recently captured the national and international imagination because we address deep concerns about meeting the needs of students and society and about the relevance of higher education. Our success in transforming undergraduate education and developing strong collaborations with the community has led to changes in the way we educate students that benefit them as well as the institution. This tradition of responsiveness continues with President Bernstine, who envisions PSU in his essay for the portfolio as a university "so thoroughly engaged with its community" that the community thinks of it as "our university."

Our location in Portland provides another reason to do what we do. Because we are located in Portland, students, faculty, and staff are able to engage with the critical issues of our time in a "real world" laboratory, most directly through our senior Capstone courses and our other community-based curricula. Portland is a city known for its livability, for urban planning and sustainability, and for the fact that the majority of middle-class citizens send their children to public school. Our emerging vision thus rests on the unique strengths, aspirations, and values of Portland and the Pacific Northwest.

A New Way of Knowing Ourselves, a New Epistemology

Turning now to Davies' idea that electronic institutional portfolios represent a new epistemology and informed by the narration above, we take up each of our questions in turn.

Does the Portfolio Represent New Ways of Knowing and Learning? The portfolio does represent new ways of knowing and learning—indeed a new epistemology—because it organizes what we know about the institution in a multi-dimensional and relational way. With the exception of the section on Vision and Planning, the faculty committee constructed the portfolio around functional categories: Community and Global Connec-

tions, Institutional Effectiveness, Research and Scholarship, Student Success, and Teaching and Learning. Early in the development of the portfolio, however, we found that much of the content did not fit easily into discrete boxes. Through its use of menus and hyperlinks, the portfolio allows users to make connections across common themes. Using hyperlinks, we were eventually able to develop portfolio "tours" that allow users to follow thematic pathways, rather than focusing narrowly on one category or another. An example of this is the "Diversity Tour," which demonstrates how diversity is woven into various programs and initiatives, and student and faculty work. The structure of the portfolio enables a user to "prowl" around a wide range of functional categories.

The Web medium forces us to think differently about how we compile and present information. We have the ability to combine narrative with audio and video and to use graphical representations not possible in print. But there are limitations; too much narrative can cause fatigue for the reader, overuse of hyperlinks within text or throughout a page can be confusing and detract from the main thrust of the material, and too much animation or too many technical gimmicks may limit the audience to those with high-end computers. PSU adopted a straightforward approach, using simple navigation, clean, uncluttered pages, and uncomplicated organization of materials under headings that are familiar to a wide variety of users.

Has the Portfolio Increased Our Capacity to Know Collectively What We Know or Need to Know? The portfolio has expanded the pool of faculty members and administrators who have a grasp of the entire institution (Kahn 2001). It has broadened people's perspectives beyond their own departments, helped them define an internally cohesive vision for the institution, and enabled them to see the institution as a whole and to concretize their sense of the institution's mission. Faculty members' first loyalty is most often to their disciplines. Because they do disciplinary work in a particular context, the portfolio may prove to be a vehicle for them to think institutionally and understand that institutional success is tied to their own.

We now understand that each section of the electronic portfolio should begin with an answer to the relevant "why" questions. Narratives can provide answers to these questions. One technique we are using is to ask key individuals to write reflective pieces to introduce the initiatives, programs, and activities represented on the portfolio Web site, so that the content that follows is clearly contextualized. For example, the Faculty in Residence for Assessment has been invited to prepare an essay on department-level assessment at PSU, describing the initial plan for assessing student learning within departments and its implementation. This essay will not only set the stage for an understanding of assessment processes at PSU, but will also mesh with the broader purposes of the portfolio as a site for reflection and self-assessment.

In some sections, we have just begun to address the "why" questions. For example, the section on Research and Scholarship provides a clear rationale for research related to our urban mission: it is our responsibility and opportunity to contribute to the well-being of Portland, to discover solutions and shape new knowledge on urban issues and

concerns that contributes to the quality of our programs. In an urban university, "this interplay of knowledge and community guides our work in the state, the nation, and around the globe," a s an essay in the portfolio on the role of research and scholarship at an urban university argues. But the questions the Faculty Advisory Committee raised about our purposes as a comprehensive university are relevant here. Our dramatic increase in external funding, 14 percent over each of the past five years, has resulted both in research related to urban issues and in disciplinary research agendas not tied to our urban mission. A comprehensive, inclusive rationale crafted by faculty engaged in the broad scope of research will result in a richer answer to this "why" question.

Has the Portfolio Changed the Way We Construct Institutional Knowledge and Communicate with One Another? The portfolio has changed the way we construct institutional knowledge and communicate with one another by revealing both the connections among our various institutional initiatives and the ways in which we are fragmented. In addition to initiatives emerging directly from our core responsibilities of teaching, research, and community service, both on and off the campus, we are conducting several key initiatives that cut across these categories. For instance, we are currently engaged in four major presidential initiatives on assessment, diversity, advising, and internationalization.

Yet another initiative, the *Great City: Great University Series*, was introduced by the provost through a two-year series of roundtables and forums, beginning in 2000. The events were designed around the idea that a great city and a great university are inextricably bound. Kicked off by Portland Mayor Katz and PSU President Bernstine, the series examined strategic collaborations with community partners such as the Oregon Health and Science University, K–12 education, and creative industries. The PSU Portfolio helps inform the campus of the conversations held at these events and allows us to assess their relevance to our vision.

Other important initiatives are also underway. As part of our overall assessment plan and regional accreditation requirements, we are initiating a process of program review for the first time and developing "markers" of a PSU baccalaureate degree—institution-wide learning goals for PSU graduates. A new budget model in the Oregon University System and an increase in undergraduate enrollment of more than 23 percent over the past five years have pushed us to engage in enrollment planning. At the time that the portfolio was under development, planning was also beginning on a number of other fronts, including graduate education and research, international affairs, and information technology. Documenting each of these discussions in the portfolio, along with the institutional vision and values work mentioned earlier, offers us the possibility of examining these efforts integratively and understanding how they are interrelated or not.

Indeed, a group of faculty and administrators that has christened itself "Connecting the Dots 2002" has come together to discuss the entire array of initiatives, to see how they are connected, and to enhance the quality of the education we provide. The most promising unifying vehicle for "connecting the dots" is the Urban Universities Portfolio

Project. Our goal is to create greater institutional alignment, to help faculty members, department chairs, and deans to see the interrelationships among all of our activities in order to carry them out more efficiently and productively. The portfolio helps enable the community to see where both knowledge and action are connected across the campus. It also lets us see the gaps that may exist. The portfolio has the capacity to allow us to see the whole of our institutional initiatives in a way that is not ordinarily possible—and to relate all of them back to the "why" questions.

The material in the portfolio documents institutional initiatives, research, and learning outcomes, demonstrates the connections among these activities, and encourages users to think about why and how these relationships have emerged. When we invite users into the PSU portfolio, we provide them with the means to tell us what they think, to comment on what they have seen, and to help us see connections that may not be apparent to those of us within the institution. In this way, the electronic institutional portfolio becomes a tool for the reflective institution, rather than simply a repository of information. But we will construct institutional knowledge and communicate with one another differently only when the portfolio is viewed not just as one more initiative, but also as a way to integrate, connect, and communicate across initiatives. Only then will it represent a new way of knowing and learning.

Conclusion

The tradition of institutional change as scholarly work that our recent predecessors imagined, particularly the agreement that every plan for change at PSU would be integrated with national discussions, has been enriched by our participation in the UUPP. Locally, it brought our most pressing institutional issues to the fore and enhanced our planning processes. Our effort to probe the idea of the portfolio as a new epistemology highlights for us the tension between the static quality of academic print culture and the fluidity of media technology. Finally, we intend that these reflections on the portfolio project will contribute not only to our local knowledge at PSU, but also to collective knowledge about institutional reflection and planning outside Portland State University, as we deepen our understanding of why we do what we do.

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