

BANNAN GRANT PROPOSAL COVER PAGE	Date:	October 15, 2010
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1.	Proposal Title	An Evaluation of the Ignatian Faculty Forum: Assessing its Role in Faculty Formation				
2.	Name of Applicant	IFF Facilitation Team: Delbecq, Dreher, Dunbar, Velasco				
3.	Phone	408 554 4629	E-Mail	adelbecq@scu.edu		
	Fax					
4.	Type of Grant (check one)	<input checked="" type="checkbox"/> Bannan Grant		<input type="checkbox"/> Dialog & Design Grant		
5.	Required: Provide your 4-6 letter department or program ID. This is not a fund number. (i.e. ECON for Economics Department; LACLNC for Law Clinic)					
	Department/Program ID	I	C	J	E	
	Contact Person	Patricia A. Murakami			Extension	1-1951
6.	If your department does not provide administrative assistance to manage grants, we will provide assistance. Will you be in need of assistance to manage your grant?				<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
7.	Total cost of proposed project:				\$	12,732.00
8.	Amount requested from the Ignatian Center: <i>equal to or less than full amount listed</i>				\$≤	12,732.00
9.	Amount requested from other sources, if any (please list):				\$	
					\$	
					\$	
10.	Please briefly explain what will happen to this project if you do not receive funding from the Ignatian Center:					
<p>Without funding this project cannot go forward. If a Bannan Grant cannot cover the full cost of this project, funding might be able to be sought from the Provost's office and/or alternative Ignatian Center sources.</p>						
Department Chair or Supervisor Approval		Kevin P. Quinn, S.J.				
		Name (type/print)		Signature		Date

Submit all proposals to: Theresa Ladrigan-Whelpley, Ignatian Center for Jesuit Education, Sobrato Hall, Room 34, Santa Clara University, 500 El Camino Real, Santa Clara, CA 95053-0454. tladriganwhelpley@scu.edu
 Electronic **copies** of proposals via email are encouraged.

BANNAN GRANT PROPOSED BUDGET	Date: October 15, 2010
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Proposal Title	An Evaluation of the Ignatian Faculty Forum: Assessing its Role in Faculty Formation
Name of Applicant	IFF Facilitation Team: Delbecq, Dreher, Dunbar, Velasco

I estimate that I will spend the requested funds as follows: this budget listing has the same figures & purposes as the detailed budget in the attached grant proposal: "An Evaluation of the Ignatian Faculty Forum: Assessing its Role in Faculty Formation"

<u>Primary Account</u>	<u>Description</u>	<u>Amount</u>	
SUPPLY	Office, lab, instruction supplies	\$	
REPROD	Postage, mailing, fax charges	\$	
BSTRVL	Domestic transport, lodging, meals: FOR CELESTE MUELLER	\$	\$ 1056
SPCEVT	Food, room charges for special event	\$	
CONTRS	Guest speaker honoraria, research subject fees, professional services SULLIVAN: Survey design & analysis MUELLER: Expert Consult Faculty Formation NICHOLS: Content Analysis: Letters&Leadership	\$	\$ 3500 (Sullivan) \$ 3500 (Mueller) \$1000 (Nichols)
MISC	Publications, subscriptions, membership dues	\$	\$ 80 (Survey Subscription)
STFSAL	Staff salaries	\$	
SWAGE	Student wages: Supervised by Prof. Nichols	\$	\$ 2900
BENEXP	Faculty salary	\$	
BENEXP	Benefit expenses for faculty, staff, student	\$	\$ 350 (Sullivan)@10% \$ 100 (Nichols) @10% \$ 246(Students)@.85%
**Please Note: In the event that this grant is awarded, your department is responsible for any associated overdrafts.	TOTAL	\$	\$12,732.00

BANNAN GRANT PROPOSAL EVALUATION FORM			Date:	
Proposal Title	An Evaluation of the Ignatian Faculty Forum: Assessing its Role in Faculty Formation			
Name of Applicant	André L. Delbecq, on behalf of the IFF Facilitation Team: Delbecq, Dreher, Dunbar, Velasco			
Phone	408 554 4629	Email	adelbecq@scu.edu	
Part I:	<i>(To be completed for submission along with your original grant proposal.)</i> List the intended outcomes for this project: (use additional pages if necessary)			
<u>Objective Evaluation Reports:</u>				
Survey Research Report: electronic survey of former IFF Participants (Survey designed, set up, and analyzed by Professor Kieran Sullivan)				
Expert Reviewer Report: from outside consultant/expert in leadership (including faculty) formation, Celeste Mueller, Director of Vocare Center, Aquinas Institute, St. Louis				
Content Analysis Report: of Letters of Evaluation from former IFF Participants, and their leadership roles (Analysis designed and undertaken under directorship of Professor Laura Nichols). This report will contribute to a longitudinal view of the impact				
<u>Reflective, Summative Response to Evaluation Reports:</u> Reflective response to significant findings from the three major reports listed above, with recommendations based on those findings concerning on-going development of the Ignatian Faculty Forum				
Pending approval of your grant, Parts II & III are to be completed at the end of your grant period				
Proposal Budget Account Number				
	Fund	Dept ID	Program	Activity
Part II:	Briefly describe the actual measurable outcomes of this project and the assessment tools you used: (use additional pages if necessary)			
Part III:	Describe any other outcomes of your project.			



Santa Clara University
Ignatian Center for Jesuit Education

**Project Title: An Evaluation of the Ignatian Faculty Forum:
 *Assessing Its Role in Faculty Formation***

The Purpose of the Project (Statement of the Problem)

The Bannan Institute has sponsored the Ignatian Faculty Forum for eight years. Proposed as an experiment in 2001, the first faculty cohort of ten plus two facilitators commenced in 2002. At the end of that year, the majority of participants expressed a strong desire to continue in an advanced group. Since 2003 both an initial forum - IFF 1- and an advanced Forum - IFF 2- have been in place to deepen faculty commitment to the Catholic/Jesuit mission and values, to the role of the scholar/teacher as a calling, and to integrate spiritual practices into the lives of participants.

Each year individual participants have written letters describing their experience in the Forum, its personal impact, and assessing aspects of the Forum they found positive or wish modified. The letters have been very affirming of the value participants place on their time within IFF.

Nonetheless, it is time for a careful objective evaluation of this important program. There are a number of reasons:

Evaluative program review will assess the IFF in relation to its objectives as a vital faculty formation program that is mission-centered and rooted in fresh exploration of ways the Ignatian tradition can be integral to the lived experience of teaching scholars who are also developing as leaders in the University community.

However strong the present design and outcomes, an evaluation will doubtless point out areas for improvement.

Evaluation will provide a strong basis upon which the University can consider continuing its support to enable sustainability of the IFF and its leadership team of co-facilitators.

Impartial assessment is in keeping with the norms of good practice within the university.

Other universities frequently inquire about and visit IFF. Visitors have come from within the Jesuit network (e.g. John Carroll, University of San Francisco, Regis University, Fairfield University), but also from other faith-based Universities (e.g. Brigham Young University, Benedictine University of Illinois). The Western Academy of Management invited a report from IFF as part of its annual program. (It was noteworthy that faculty from universities such as the University of Southern California expressed envy regarding the opportunity available at Santa Clara through IFF). Because of this visibility, objective and distributive data regarding outcomes should be made available.

The Founder/Director of the Program will soon be entering phased retirement and a change in Facilitators will take place. Succession planning will benefit from objective assessment.

The documents to be produced via the methods proposed immediately below will provide a valuable archive not only for assessment but also for holding in institutional memory important objectives and achievements of the Ignatian Faculty Forum, and the voices of its participants.

Methods

We propose three different evaluation methods, in order of priority.

- 1) Under the direction of Professor Kieran Sullivan, an experienced survey researcher, a survey instrument is being designed. Faculty who have participated in the program will be asked to complete the survey electronically.

Purpose: using survey data to evaluate factors such as motivations for participation in the IFF; the Forum design elements that shape the process of its meetings; participants' views of the most important outcomes of participating in the IFF; and the impact of the IFF on participants' leadership.

- 2) Professor Celeste Mueller, Director of the *Vocare Center*, Aquinas Theological Institute, St. Louis, has agreed to serve as an outside reviewer. She will have access to the prior assessment documents, review the program's readings and resource materials, attend an IFF Forum, and interview six former participants. The *Vocare Center* has been a major provider of leadership formation courses and programs for both Catholic Healthcare and Catholic Higher Education. Professor Mueller is also involved in a task force reviewing best practices for formation of leaders in faith-based, mission-centered institutions. (See, for example, Grant Projects listed on page 5 of her attached *curriculum vitae*.)

Purpose: to bring an expert outside perspective, informed by years of national experience in faculty formation, leadership formation, and spiritual formation, to qualitative assessment of the IFF, with suggestions for the program's further development.

- 3) Under the direction of Professor Laura Nichols, an experienced qualitative researcher, the file of participant letters from the last eight years will be content analyzed. Key themes will be identified.

Purpose: to evaluate the key contents of the valuable archive of participant letters in order to learn from what participants identify as most valuable and effective, and to pinpoint areas for future development.

It should be noted that relative to both methods 1 and 3 considerable work has already been undertaken by IFF Facilitators. A first draft of survey questions, at the end of which is a list of variables entitled "Factors Influencing Decision to Participate," is attached. Prompted in part by this draft and list of variables, the role of the researchers will be to clarify constructs and create defensible objective probes.

After the leadership team has had an opportunity to study each of the three reports, we will prepare a summative reflection based on those findings that will enable us to specify directions for on-going development of the IFF.

Timetable

The intent is to complete data gathering in Winter Quarter, and to receive written reports from the three evaluation efforts by the end of Spring Quarter 2011. A time-sensitive issue is that Professor Mueller is available for consultative work as an expert reviewer this year, but may not be available in a future year.

Relevance to the Bannan Institute

The IFF is one of the key programs the Bannan Institute supports. It is a major investment in the formation of emergent faculty leaders upon whom the Catholic/Jesuit character of the university will largely depend. The concern with Mission and Identity in Catholic Higher Education does not need elaboration. However, achieving this formation is a key challenge. A program seeking to increase psychological, spiritual and leadership maturity deserves careful attention.

The IFF is the only faculty formation program on campus specifically designed to provide regular, sustained times for reflection in a community, a circle of trust, that encourages faculty members to explore how their scholarship, teaching, and servant-leadership might connect to their diverse spiritual and moral concerns and to the Ignatian tradition. The IFF supports members at differing stages of their journeys as they seek to integrate the professional, personal, and spiritual dimensions of their lives, seeking their own wholeness as they, in turn, offer education of the whole person to their students, and offer support of the whole person to their colleagues.

The design of each four hour monthly meeting of the Forum during the academic year includes time for prayer, meditation, contemplative reading of spiritual reflections, and time for sustained discussion of assigned readings concerning Ignatian spirituality and related important themes. Topics for the IFF 1 binder of readings, for example, include, among others: the nature of calling/vocation; Ignatian spiritual practices that support “finding God in all things,” like the examen and discernment; what becoming a “contemplative in action” might mean in our lives as teaching scholars and leaders; how we might relate our professional and personal lives to commitments to work for justice.

Each meeting also includes time when faculty members can bring to the gathered Forum current issues challenging them in their lived experience as scholars, teachers, and leaders for which they seek communal and spiritual support in the discernment process.

In evaluating participants’ experience of the IFF, and its impact upon their formation, we will be assessing outcomes such as the following:

- Understanding Ignatian spirituality
- New understanding of the scholar/teacher role as a calling, not just a job or career
- Increased understanding of and commitment to the overall university mission, not simply to one’s discipline
- A refined approach to decision making that is inclusive of discernment and solidarity
- Ability to articulate Catholic Social Thought and integrate values into scholar/teacher decisions
- Confidence in exploring spiritual dimensions of academic life in a religiously pluralistic environment
- Development of a critical mass of mission-centric leaders who collaborate in sustained transformation efforts
- Understanding of the mystery of suffering associated with leadership and helping to avoid burnout and cynicism
- Impact of the IFF on member’s scholarship, teaching, and leadership formation

A quarter of a century of organizational research suggests that without intensive, extensive and durable investments in leadership formation deep organizational cultures cannot be sustained. Formation of the future generation of faculty leaders has to be intentional. It cannot be achieved simply through hope. The IFF provides a unique approach that is contextualized, where formation takes place in the ebb and flow of wrestling with issues critical to the life of the scholar/teacher. This is congruent both with best practice in leadership studies, and with an Ignatian spirituality of love unfolding in the action of one's life. It is appropriate that we pause and evaluate the IFF's strengths and potential for improvement.

Approval of Chairperson or Supervisor

In this instance, the supervisor of the program is Kevin Quinn, S.J., Director of the Ignatian Center for Jesuit Education.

Budget

Estimate of Hours and Expense Ignatian Faculty Forum Program Review Survey To be conducted by Professor Kieran Sullivan

Expenses

Survey Monkey Subscription for four months	80.0
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Hours

Refine survey	10 hours
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Enter into Survey Monkey	10 hours
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Analyze data	15 hours
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Writing Report	20 hours
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<u>Fee for Design, Set-up, and Analysis</u>	\$3500.*
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Fringe Benefits	350
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<u>Total Cost for Survey Design, Set up and Analysis</u>	<u>\$3930.00</u>
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*Professor Sullivan indicated in initial conversation that her fee for survey design is \$150 dollars an hour x 55 hours = \$8250.00. She has generously agreed to undertake this effort for a much reduced honorarium.

Estimate of days & expenses, Visit by Expert Reviewer/Consultant Dr. Celeste Mueller

One Day: Review of Documents

Two travel days, St. Louis – California	Fare:	\$ 456.00
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Three Nights Lodging	350.00
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Meals, Ground transportation, misc.	250.00
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One Half Day, Visit IFF Group

One Day, Conduct six interviews

Two Days, Prepare Report

Honorarium:	\$3500.00**
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<u>Total Cost for Visit of Expert Reviewer/Consultant Dr. Celeste Mueller:</u>	<u>\$4556.00</u>
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** Professor Mueller's fees are normally \$1800 a day, half fee from travel days. (4.5X1800 = \$8100. Again we have a generous agreement to undertake this effort for a much reduced honorarium.

Estimate of Hours and Expense for Ignatian Faculty Forum Program Content Review of Participant Letters to be conducted and supervised by Professor Laura Nichols

Methods: (1) Content analysis of letters for IFF Participants and (2) Web research to determine current and previous leadership positions of IFF participants.

Purpose: The purpose of the content analysis assessment is to determine the impact of the IFF on individual participants as well as on the campus through the leadership roles that participants have held.

Research Process:	Responsible Party:
Creation of a coding scheme that capture relevant themes (Coders should be able to add to the initial list.)	Assessment team
Coding of each letter (n=90)	Student coder/s
Compiling quotes from each letter for each theme	Student/s
Web and CV research to document timeline of leadership positions pre and post IFF for each participant (n=100)	Student/s
Write up findings by Professor Laura Nichols	

Estimated Budget:

Creation of coding scheme (assessment team time: 5-10 hours)	
Letter coding: 1 hour per letter for 90 letters @ \$10 hour	\$900.00
Compilation of quotes/themes if letters electronic so cut and paste: 10 hours per theme @ 10 themes	1,000.00
Web/CV research and data entry into Excel 1 hour per participant for 100 @ \$10/hour	1,000.00
Final Report Write-up (10 hours) Professor Nichols	1,000.00
Fringe Benefits: Professor Nichols @ 10%	100.00
Fringe Benefits: Students @ .85%	246.00
<u>Total Cost for Content Analysis of Letters from Past Participants</u>	<u>\$4,246.00</u>
<u>Total Cost of Overall Project:</u>	<u>\$12,732.00</u>