IHS FY17 Mid-Year Proposal to the Charles Koch Foundation

Vision and Strategy

As IHS welcomed a new president and CEO late last year, it was clear that she was stepping in at a pivotal point in the organization's history. IHS has never enjoyed a broader reach or more robust support than it has at this moment. At the same time, it is also clear that if higher education is to play a significant role in fostering a freer and more open society, it will not be through adjustments at the margin. We believe this moment has step-change potential if we thoughtfully leverage our most valuable asset: our faculty network. We propose near-term experiments aimed at testing and building capabilities to have an impact at 10X+ and 100X+ our current level. With the Foundation's support, over the next six months we will test our hypotheses—gaining insight in time to refine experiments and scale what works in FY18.

Same Vision, Sharper Focus on Faculty

Ideas shape the world. The ideas that are taught, debated, and researched at institutions of higher learning play a critical role in determining the rules that govern political, civic, and commercial life. They determine, therefore, whether we live in a world in which the great creative force of human potential is unleashed or bound. And it is for this reason that IHS focuses its work within the academy. "Change the academy, and we change the world" has been, and will continue to be our guiding paradigm. Our vision, therefore, in which a significant majority of college students encounter, and a growing number of faculty explore and advance the ideas of a free and open society, remains unchanged.

While our vision remains the same, we believe that a sharper focus on faculty is the key to unlocking the potential of this moment in IHS's history. In one sense, this emphasis is not new. IHS has long identified faculty as a key ingredient in our recipe for social change. This is why we invest in growing the pool of academic talent capable of advancing classical liberal (CL) ideas.

But the pace of growth in our academic pipeline is too slow to realize the magnitude of change we seek. While our current count of 2,000 alumni professors—a two-fold increase since 2007—is encouraging, relative to the challenge, it is not nearly enough. Further, our cultivation of non-alumni faculty partners is ad hoc, meaning we are missing opportunities to broaden our reach and deepen our impact. Finally, because systematic and tangible support ends once a graduate student secures an academic post, IHS is a relatively ineffective bystander over the thirty-five-year arc of a faculty member's professional career. We believe this is the moment to initiate a shift in strategy that will tap the potential missed up to this point.

Imagine, for example, what our graduate student-support capability might look like if hundreds of trusted faculty at PhD-granting institutions acted as our agents. Not only would they help us grow the pool of CL talent, they would also be in a position to deploy their local knowledge to tailor support in specific ways, substantively advancing the career potential of individual students. Further, by leveraging our current faculty network and collaborating with aligned non-alumni faculty, we can significantly scale our partnerships with digital textbook publishers and open-source education platforms to become a

leading source of CL ideas at the introductory level, and more effectively champion free speech and open inquiry at college and university campuses.

In what follows, we describe experiments we can undertake now to test the scale and deepen the impact of our graduate fellowship programs, grow partnerships with innovative educational content providers, and support empirically-based scholarship on free speech and open inquiry.

Building a "Faculty Moves Management Capability"

But the most significant source of potential we have yet to tap is the influence IHS can have over the full arc of a faculty member's career. Imagine the increased impact faculty in our network would realize if IHS were to serve as "the best dean they have never had," connecting them to opportunities that will enable them to move farther and faster than their non-CL peers. Accomplishing this would mean developing a robust suite of opportunities designed to accelerate and broaden the reach of their research, advance their progress toward becoming masterful teachers, and elevate their profile within and beyond their campus communities.

Over the next six months we will prototype and test opportunities of this kind to discover the intersection of what is viable, what forms of support faculty value most, and which initiatives hold step-change potential in terms of scale, impact, or both.

To make these strategic pivots, IHS must make a fundamental shift in how we manage our relationships with aspiring and current faculty. Our organizational structure and information-management systems must be adapted to ensure the most-promising talent across the IHS academic network—from aspiring professors, to early and mid-career faculty, to senior faculty poised to step into positions of administrative leadership—get the right support at the right time. To build this capability we will apply a "moves management" paradigm, commonly associated with donor cultivation, to graduate student and faculty relationship management.

Because a moves management approach is deliberately designed to capture, share, and leverage local knowledge of academic talent, having this capability will significantly improve IHS's ability to advise strategic partners on first-time, mid-career, and senior-level placements. Further, this capability will inform our efforts to support campus-wide cultural change—change that is driven by faculty partners—through our Free Speech and Open Inquiry (FSOI) initiative.

Building Our Reputational Capital

Finally, given our sharper focus on faculty, this moment in IHS's history is one in which we must greatly increase our presence and credibility in the academy. Higher education is a reputation-driven industry. If we are to significantly enhance our ability to help place faculty; if we are to have significant influence on the direction, pace, and scope of career development among graduate students and faculty in our network; if we are to become a "go-to" resource for introductory-level ideas in the CL tradition; if we are to grow our partnerships with non-traditional allies in support of free speech and open inquiry, then elevating our academic brand must be a deliberate part of our overarching strategy. In what follows, we describe steps we are taking to bring about this change.

Proposed Program Experiments & Scaling

Building Relationship, Support, and Talent ID Capabilities

IHS will support aspiring and current freedom-friendly professors across the full arc of their careers, serving as "the best dean they never had." Key to this vision are: (1) building a relationship-management capability to scale and improve support for aspiring and current faculty, (2) experimenting with a suite of research-support programs, and (3) increasing education and talent identification of aspiring academics.

1. ***Relationship Management for Faculty. \Ne*** will build a "moves management" capability for faculty relations, ensuring the most-promising talent across the IHS academic network get the right support at the right time. (See page 9 for a graphical model of the relationship-management capability.) Currently, we work closely with about 40 faculty; our goal is to work closely with 400 faculty by the end of FY18. (The early experiment is designed to gauge whether a 10X increase is feasible in a single fiscal year.) Building this capability involves:

   - Identifying and supporting a broader spectrum of academic talent who can actively contribute to advancing a free and open society, not just "IHS alums" or self-identified classical liberals / libertarians.

   - Seeking regular input from faculty in our network via personal outreach, events, etc., starting with a "Faculty Summit" in July with 15 of our most-trusted faculty partners.

   - Revamping the IHS academic talent-evaluation rubric to better align our talent pool with known demand for academic talent (e.g., scholars researching key issue areas).

   - Reallocating internal staff and recruiting new staff to serve as "account owners," who will build knowledge of and relationships with faculty in their portfolios and execute career-advancing "moves" (e.g., colloquium invitation, connection to a senior colleague in the network, or grant opportunity).

2. ***Research Support Experiments.*** A scholar's publication record is the most important variable for landing a faculty position, earning tenure, securing more-leveraged positions over time, influencing their discipline, and impacting public policy. To help strengthen scholars' research, we will experiment with a broad range of research support, each of which will serve as a "move" in our faculty moves management capability:

   - Faculty Research Awards. This pilot will offer faculty relatively modest grants of $3K-$6K to underwrite research expenses of short-term projects. By doing so, we: 1) accelerate the pace of scholarly growth for faculty in our network; 2) expand our faculty network; 3) rebrand IHS in the minds of academics as a source of support for faculty; and 4) gain valuable insight on individual faculty poised to take the next step in their journey with IHS programs, to receive larger research awards, and/or to move to a more leveraged position within the academy. We will experiment with 20-30 awards in 2017. We believe that this initiative is among those with the greatest potential to scale, and the experiment is designed to test that hypothesis.

seminars will be valuable "moves" for top academic talent with policy-relevant research agendas.

- We propose hosting a Policy Research Seminar in conjunction with the American Political Science Association annual meeting. This seminar will be a continuation of our partnership with Mercatus' Program for Economic Research on Regulation (PERR), with the goal of introducing an audience of 35 political scientists to the RegData and QuantGov system that PERR has developed.

- We propose hosting an entrepreneurship-focused seminar connected with the Academy of Management (AOM) conference in Atlanta, engaging an audience of approximately 15 university center-builders. This seminar will support center-builders' efforts to incorporate the theme of entrepreneurship into academic research, public communications, course curricula, and mission building. This program will also lay the foundations for a Center-Builder's Network that will serve as a source of advice, professional growth, and strategic visioning.

4. ***Exploring Liberty Discussion Colloquia (ELDCs). We*** propose scaling our on-campus, Liberty Fund-style colloquia for undergrad and graduate students, held on campuses across the country in partnership with faculty. ELDCs have proven to be a cost-effective, scalable model for providing in-person intensive education to students and identifying prospective academic talent. ELDCs also serve as a "move" for the faculty partner, allowing us to build the relationship and gather local knowledge about what step might be needed next.

   Based on strong interest from faculty partners, we see an opportunity to run 150 ELDCs with 2,400 participants in 2018, up from 40 events a year over the last two years. We anticipate 25% of ELDC participants will be qualified for continued investment and 10% qualified for the academic talent pool. Our current Templeton grant will cover ELDC expenses for fall 2017, but Templeton funding expires at the end of 2017. The Marcus Foundation has agreed to support 15 ELDCs per semester starting in 2018. However, to begin securing faculty partners and planning events for spring 2018, we ask the Foundation to consider funding half (30) of the anticipated balance of 60 ELDCs for spring 2018.

5. ***PPE/PPEL Curriculum Project.*** As the number of PPE/PPEL centers and programs continues to grow, the faculty involved are eager for a trusted source of curriculum content. IHS will leverage its faculty network, relationships with textbook publishers, and content-creation capabilities to supplement and magnify the impact of the PPE Network. We will partner with OpenStax/Merlot to create a curriculum center on that platform, featuring materials from existing PPE/PPEL programs as well as existing (unbranded) *Learn Liberty* content. We will partner with Cengage and other textbook publishers to include these materials in newly created PPE/PPEL digital textbooks. And we will market these resources to PPE/PPEL programs across the U.S.

The efforts outlined above will help close the gaps toward:

- increasing the academic talent pool to 2,500 by the end of FY18;

- ensuring at least 1,000 faculty secure leveraged position between FY17-FY20;

- helping 1,000 faculty actively advance the ideas of freedom between FV17-FY20; and

- developing capabilities needed to blow past these near-term goals and have a 10X+ impact.

Free Speech and Open Inquiry (FSQI)

Faculty leadership is critical for defending and advancing FSOI in higher education. Yet faculty are often unaware of the depth and nature of the threats to FSOI on their campus and in the academy, and they are not fully supported or equipped to be effective free speech advocates. To fill this gap, IHS is informing and engaging faculty by developing a forum for scholarly debate, discussion, and thought leadership regarding FSOI. By growing and leveraging our faculty network, we see opportunities to make faster progress. Over the next six months, we will experiment with:

1. ***Supporting FSOI Empirical Research.*** News outlets as varied as the *New York Times, Fox News,* and *Chronicle of Higher Education* are regularly covering campus protests, heckler's vetoes, and dis-invitations. But such coverage is often dismissed, given the dearth of empirical evidence on the causes and effects of efforts to shut down the free exchange of ideas. IHS aims to close this gap by supporting and publicizing scholarly, empirical research about the intellectual climate of higher education.

   Building on a pilot research project earlier this year with Dr. Samuel Abrams (Sarah Lawrence College), IHS will support research focusing on the role that student-facing college and university administrators (e.g., staff within Offices of Student Affairs) play in encouraging/discouraging policies and practices hostile to FSOI. Our early research suggests this segment of administrators is actively involved in student protests. Our questions are: Does this finding hold up in a larger study? If so, what drives this finding? For example, are student affairs staff becoming involved in student protests to attend to safety issues and respond to regulatory pressures? Or is the motivation to advance a particular ideological perspective? And what within the training and education of student affairs staff drives toward this result? Assuming that Dr. Abrams' early findings are affirmed, documented empirical research of this kind will demonstrate the degree to which non-academic administrators have undermined (intentionally or not) the role of faculty and academic leaders in shaping the intellectual climate on campuses, and guide faculty leaders as they re-assert their leadership on questions related to campus free speech.

   IHS proposes to launch a national study of roughly 600 student-facing administrators this summer, and to issue a report publicizing the findings in the fall. We would also work with Dr. Abrams to share the findings through a series of op-eds in major national publications and higher education publications. Dr. Abrams has already earned multiple major media hits on such issues, in outlets including the *New York Times, Chronicle of Higher Education,* and *Inside Higher Education,* among others. With this empirical research, IHS will be in a position not simply to respond to crises as they happen, but to begin driving a scholarly conversation about why these crises keep occurring and what positive steps faculty and administrative leaders can take to protect free speech rights on campus.

2. ***FSOI Academic Volume.*** Threats to FSOI in higher education are deep, and faculty do not always understand the nature of these threats until it is too late to combat them. IHS proposes to work with campus free speech expert and IHS Visiting Fellow Dr. Donald Downs to organize and publish a volume in which noted faculty from a range of fields and perspectives will discuss key threats to campus free speech - and share strategies for how faculty can respond to these threats. Such a volume will be marketed broadly online, positioning IHS as a resource for faculty leadership on campus free speech and helping to identify faculty who might be interested in taking on a leadership role on their campus. Our goal is to get 25,000 faculty to download the volume, 2,500 faculty to opt-in to regular communications about IHS's work on free speech, and 250 faculty to partner with IHS on FSOI-related activities.

3. ***FSOI Student Orientation Kit.*** There is a gap in pro-free speech, pro-civil discourse materials for use during freshman orientation. IHS can fill that gap by developing, producing, and distributing an FSOI Student Orientation Kit for use by faculty, administrative partners, and student affairs departments on campuses across the country. Based on a recent free speech freshman orientation at Purdue University, the proposed kit could include a video, readings, and other materials that can be included in existing orientation plans and tailored to a campus. The video will feature credible faculty and academic leaders highlighting a positive vision for FSOI and the important role it places in advancing knowledge and, ultimately, human progress. IHS will partner with faculty and academic leaders to develop the kit this summer and test it on 15-20 campuses this fall.

These proposed FSOI efforts, in addition to our current efforts, will help close the gaps toward:

- demonstrating culture/institutional change on at least 200 campuses by the end of FY18;

- partnering with 500 faculty and reaching 20,000 faculty and administrators on this issue by the end of FY18; and

- developing capabilities needed to blow past these near-term goals and have a 10X+ impact.

Broadening and Elevating the Profiie of IHS

In order to influence more placements; have a significant influence in the direction, pace, *and scope of* career growth among faculty in our network; begin to build relationships with non-traditional allies; and advance efforts across our entire academic strategy, we must broaden and elevate the profile of IHS as a well-known and highly-regarded academic institute. One of the ways we can do so is by greatly expanding IHS-branded online content and activity. E.g.:

- Thought-leadership pieces authored by Emily Chamlee-Wright on FSOI and intellectually liberating pedagogical practices.

- IHS-sponsored faculty research talks live-streamed on IHS's Facebook page.

- Promoting IHS s faculty-development and support programs (including the new experiments outlined above) via campaigns on Facebook and LinkedIn.

- Promoting photos, stories, and transcripts from prestigious IH5 events (e.g., Vernon Smith's remarks from our recent FSOI event at Chapman University).

- Highlight profiles of top talent being supported by IHS, as well new research (with broad appeal) produced by IHS-supported faculty, promoted via the IHS blog and social media.

We will track engagement with our content, measured in views and time on-site. At the end of the test, we will use an online survey to measure changes in faculty's awareness and perceptions of IHS, to better understand what percentage of faculty in our core disciplines know IHS and, of those who know us, what percentage holds IHS in high regard. Metrics of this kind are proxies for the substantive change we must realize in order to be more effective in impacting higher education, e.g.:

- *The Chronicle of Higher Education* and *Inside Higher Ed* turn to IHS and the scholars with whom we are working as "go-to" resources on FSOI.

- Scholars regularly cite the empirical research we have helped scholars develop on campus-climate issues and build on the data in their own work.

- We grow the number of non-traditional faculty partnerships (e.g., video partnerships and on-campus programs).

- The number of faculty willing to recommend students to our programs increases disproportionately relative to the growth of our faculty network overall.

- We experience increased demand for content from digital textbook publishers and other partners like Curriki and OpenStax.