Anchored Continuity
Amidst Rising Tides and Shifting Shorelines

Kenyatha V. Loftis, Ph.D.

Office of Planning, Effectiveness, Assessment and Research

Introduction (*Supplemental*)

Greetings -- I started my career in institutional research, then spent fifteen years in evaluation, and recently returned to IR.

In my work, I noticed a challenge we all face: offices often document procedures, but the reasoning behind decisions — the professional judgment that allows work to adapt — is much harder to capture.

This session introduces the Internal Project Retrospective, a structured, evaluation-informed process for making reasoning visible, preserving continuity, and helping IR offices adapt intelligently to changing policies, staff turnover, and complex projects.

If your entire team turned over next year, what would be lost?

Reflect on what would be lost: reports, processes, project reasoning.

Discussion Question

Where does process knowledge primarily live?

A. Written SOPs
B. Shared drives
C. Project management tools
D. In people's heads
E. A mix

Discussion Question

Are project processes documented in a way that a new staff member could replicate them without direct coaching?

    A.   Yes
    B.   Partially
    C.   No
    D.   Unsure

Discussion Question

When staff leave, how confident are you that project knowledge is retained?

A. Very confident
B. Somewhat confident
C. Not confident
D. It depends

WHAT THIS TELLS US ...

Summary of audience reflections on where process knowledge lives, project documentation, and confidence in knowledge retention.

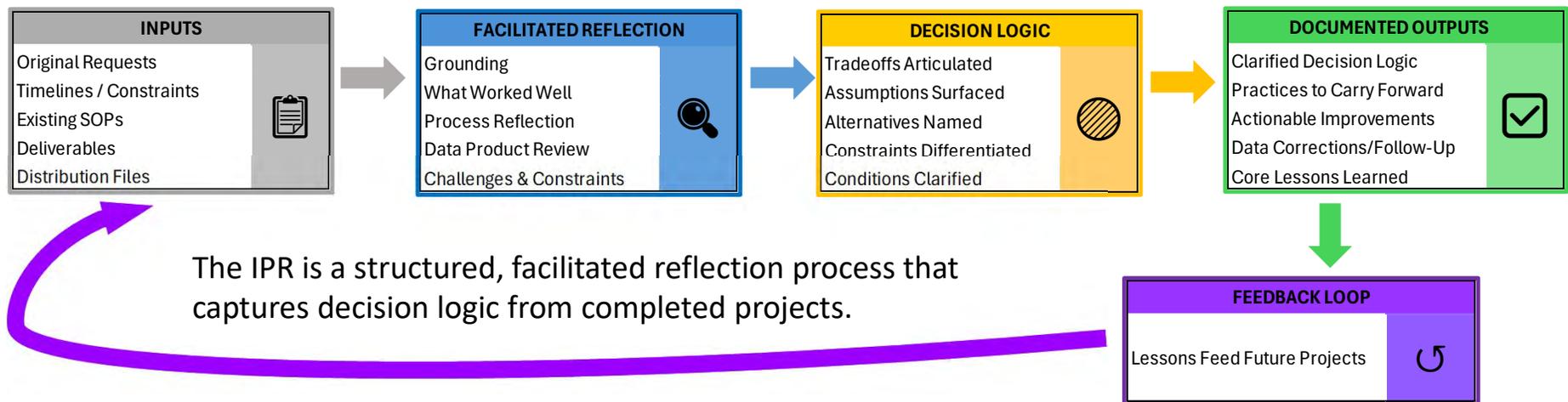# Rising Tides and Shifting Shorelines in Institutional Research

High Stakes ◊ High Customization ◊ High Vulnerability

Common challenges
- ❑ Staff turnover
- ❑ Complex data projects
- ❑ Shifting policies

SOPs often document steps, not reasoning

Internal Project Retrospective as Anchored Continuity in the Rising Tides and Shifting Shorelines of Institutional Research
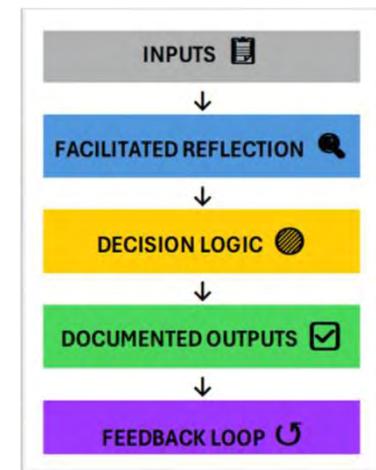
INPUTS	FACILITATED REFLECTION	DECISION LOGIC	DOCUMENTED OUTPUTS
Original Requests	Grounding	Tradeoffs Articulated	Clarified Decision Logic
Timelines / Constraints	What Worked Well	Assumptions Surfaced	Practices to Carry Forward
Existing SOPs	Process Reflection	Alternatives Named	Actionable Improvements
Deliverables	Data Product Review	Constraints Differentiated	Data Corrections/Follow-Up
Distribution Files	Challenges & Constraints	Conditions Clarified	Core Lessons Learned

The IPR is a structured, facilitated reflection process that captures decision logic from completed projects.

FEEDBACK LOOP

Lessons Feed Future Projects

Internal Project Retrospectives

Capture

❑ Procedural knowledge (how)
❑ Declarative knowledge (what)
❑ Conditional knowledge (when and why)
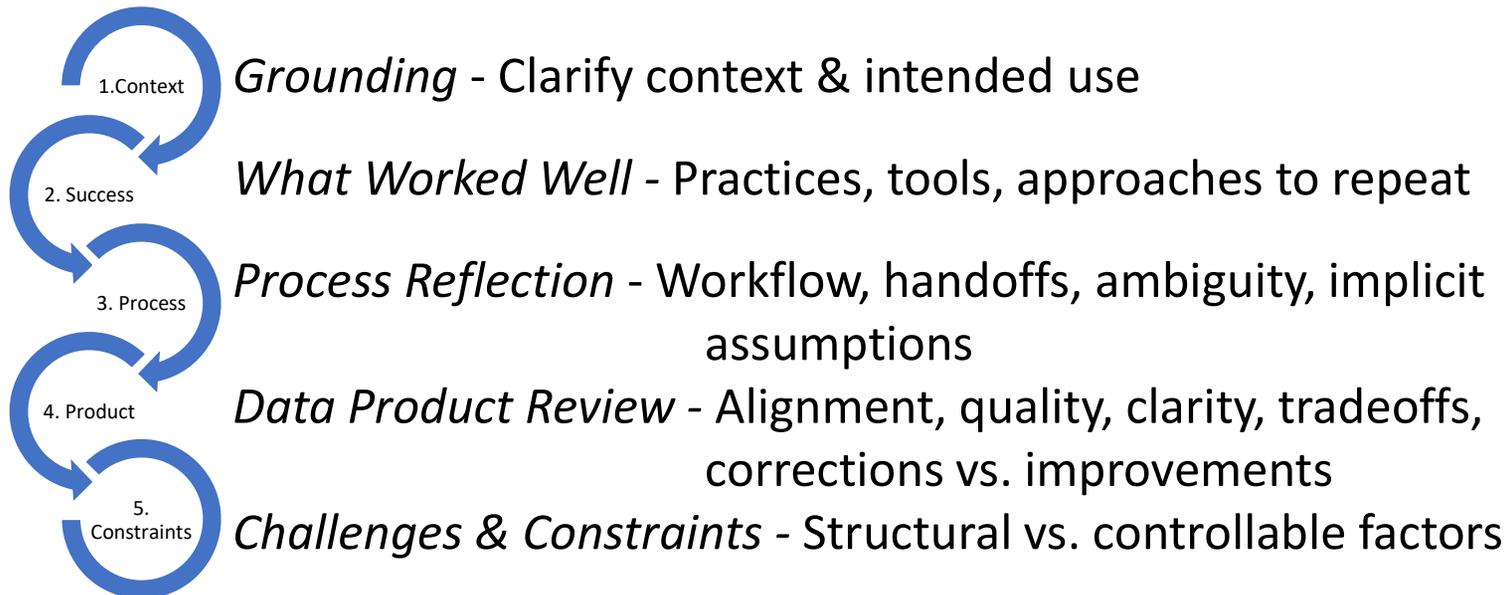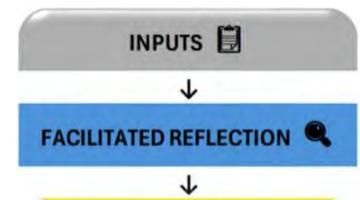
Structured reflection surfaces hidden logic

Outputs feed forward → Continuous learning cycle

INPUTS

FACILITATED REFLECTION

DECISION LOGIC

DOCUMENTED OUTPUTS

FEEDBACK LOOP

Reflection for Excavation

Inputs: Requests, timelines, deliverables, SOPs

Facilitated Reflection

INPUTS 📋
↓
FACILITATED REFLECTION 🔍
↓

Grounding - Clarify context & intended use

What Worked Well - Practices, tools, approaches to repeat

Process Reflection - Workflow, handoffs, ambiguity, implicit assumptions

Data Product Review - Alignment, quality, clarity, tradeoffs, corrections vs. improvements

Challenges & Constraints - Structural vs. controllable factors

1.Context
2. Success
3. Process
4. Product
5. Constraints

Surfacing Decision Logic

Decision Logic Capture (DLC)

- ❑ Decisions made

- ❑ Guiding assumptions

- ❑ Key constraints at the time

- ❑ Alternatives considered

- ❑ Tradeoffs accepted

- ❑ Conditions under which this decision would change

Forward Integration

Documented Outputs: Clarified decision logic, practices to carry forward, actionable improvements, data corrections/follow-up, core lessons learned

Practical, actionable outputs: SOP updates, recurring challenges, best practices, cumulative knowledge resource

Reasoning → Actionable insights

Builds transferable record of analytic decisions
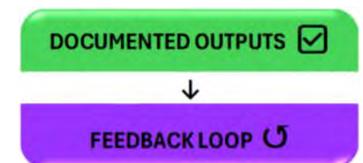
Procedural Considerations: Scalability

Tiered Adoption
- ❑ Core IPR - Light, focused on key decisions
- ❑ Full IPR - Deeper reflection for high-impact projects

Trigger-based retros
- New methodology
- Stakeholder conflict
- Accreditation cycle
- Unexpected revision request

Procedural Considerations: Power Dynamics

Structural safeguards to protect trust and reduce risk
- ❏ Distinct from performance review process (non-punitive)
- ❏ Focus on workflow not individuals
- ❏ Focus on methodological reasoning, not stakeholder conflict
- ❏ Rotating facilitators
- ❏ Clarify as internal working knowledge
- ❏ Avoid attribution of comments

IPR Implementation Essentials (*Supplemental*)

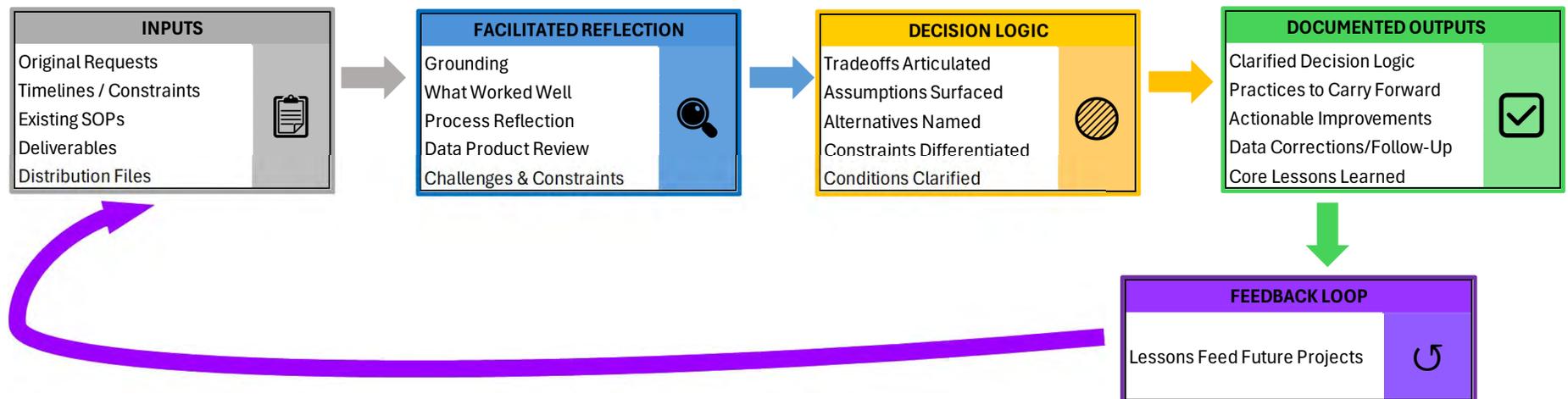**Key conditions and supports for successful adoption.**
- ❑ Successful IPRs depend on clear knowledge capture practices.
- ❑ Documentation and reflection processes must be feasible within office workflows.
- ❑ IPR complements, rather than replaces, existing IR procedures.
- ❑ Grounding in evaluation theory strengthens decision reasoning capture.
- ❑ For detailed guidance, examples, and answers to common implementation questions, see the full paper.

Adaptive Continuity Infrastructure

❑ Structured, evaluation-informed reflection

❑ Surfaces reasoning behind decisions

❑ Makes reasoning visible & actionable

❑ Supports continuity, onboarding, shared standards, learning

❑ Adaptable to different office contexts

Internal Project Retrospective

IPRs are a lightweight, structured way to preserve professional judgment — not just procedures — so that institutional research offices can adapt intelligently rather than simply replicate tasks.

INPUTS
- Original Requests
- Timelines / Constraints
- Existing SOPs
- Deliverables
- Distribution Files

FACILITATED REFLECTION
- Grounding
- What Worked Well
- Process Reflection
- Data Product Review
- Challenges & Constraints

DECISION LOGIC
- Tradeoffs Articulated
- Assumptions Surfaced
- Alternatives Named
- Constraints Differentiated
- Conditions Clarified

DOCUMENTED OUTPUTS
- Clarified Decision Logic
- Practices to Carry Forward
- Actionable Improvements
- Data Corrections/Follow-Up
- Core Lessons Learned

FEEDBACK LOOP
- Lessons Feed Future Projects

Internal Project Retrospectives as Anchored Continuity in the Rising Tides and Shifting Shorelines of Institutional Research

Kenyatha V. Loftis, Ph.D.

Senior Research Analyst
Office of Planning, Effectiveness, Assessment and Research
College of the Mainland

KLOFTIS1@COM.EDU

Presented February 26, 2026 – TAIR 2026 Conference, Galveston, Texas.

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2026

Conceptual Foundations (*Supplemental*)

Developmental Evaluation (Michael Quinn Patton)
> Supports innovation in complex, dynamic environments
> Emphasizes real-time learning and adaptation
> Positions evaluation as embedded within ongoing work

Empowerment Evaluation (David Fetterman)
> Builds internal evaluation capacity
> Promotes reflective practice and self-assessment
> Strengthens organizational learning

Related Influences
> Agile retrospectives (software development)
> Continuous Quality Improvement (CQI)
> Post-Implementation Reviews in project management

References (*Supplemental*)

Patton, M. Q. (2011). *Developmental evaluation: Applying complexity concepts to enhance innovation and use.* New York, NY: Guilford Press.

Fetterman, D. M., Kaftarian, S. J., & Wandersman, A. (2015). *Empowerment evaluation: Knowledge and tools for self-assessment, evaluation capacity building, and accountability* (2nd ed.). Thousand Oaks, CA: Sage.

Discussion Question *(Supplemental)*

What is or would be your biggest barrier to structured reflection?

Discussion Question *(Supplemental)*

Does your office conduct formal project debriefs after major deliverables?

A. Yes, consistently
B. Sometimes
C. Rarely
D. Never

Discussion Question *(Supplemental)*

Is post-project reflection explicitly separated from performance evaluation?

   A.   Yes
   B.   No
   C.   Not sure