NADOHE

NATIONAL ASSOCIATION OF DIVERSITY OFFICERS IN HIGHER EDUCATION

ROOTED IN MISSION AND VALUES

A Guide for Advancing Access, Opportunities, and Outcomes in Higher Education

ACKNOWLEDGEMENTS

This guide reflects contributions from several individuals. NADOHE takes this opportunity to recognize those who so unselfishly gave their time and expertise to inform its development.

NADOHE could not have completed this resource without the support of these generous individuals.

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A STATEMENT FROM NADOHE

Dear Colleagues,

We are living in a time of profound transformation — one which is challenging long-held assumptions about who belongs in our institutions, how opportunity is distributed, and what fairness truly requires of us. At this moment, the pursuit of fairness and equity in higher education is not simply under scrutiny; it is being actively contested. Yet, we know that the imperative remains: to build colleges and universities where *all* individuals — regardless of background, identity, or circumstance — have the opportunity to succeed.

That is why we are proud to introduce *Rooted in Mission and Values* from the National Association of Diversity Officers in Higher Education (NADOHE). *Rooted in Values* is a guide designed to support institutional leaders as they navigate this evolving landscape with intention and commitment. This guide is both timely and timeless, responding to the current political and legal realities while equipping higher education leaders with the long-term strategies necessary to foster fairness, access, the achievement of institutional goals, and institutional vitality.

Importantly, this resource focuses on principles that are widely shared and deeply rooted in the foundation of this work: fairness, opportunity, and human dignity. It is grounded in research informed by practice, and shaped by the lived experiences of higher education leaders across the country who are advancing this work under increasingly complex conditions.

This guide is designed for anyone with a stake in creating sustainable institutions that serve the public good. It is for those who are committed to moving beyond performative statements and toward sustainable, systems-based change. And, it is for those who understand that fairness, opportunity, and access must remain nonnegotiable, even — and perhaps most especially — when they are under attack.

At NADOHE, we believe that efforts to ensure fairness for everyone must evolve to meet the demands of the current sociopolitical climate while staying true to the foundational values that form the basis for these efforts. This resource is part of that evolution. It provides guidance for action, a strategy for navigating complexity, and a declaration that we will not be deterred.

We invite you to explore it, use it, share it, and join us in shaping a future where every person has a chance to succeed, and every institution is equipped to make that future possible.

In solidarity,

National Association of Diversity Officers in Higher Education

WHY THIS WORK, WHY NOW

We are in a defining moment. The sociopolitical terrain has shifted dramatically, and with it, the rules of engagement for those working to ensure fairness, opportunity, and access for all in higher education. What hasn't changed is the mission: to build institutions where every student, educator, and employee — regardless of circumstance or background — has the chance to thrive.

This resource is designed for leaders committed to advancing that mission under pressure, through uncertainty, and in ways that create lasting structural change. This guide is rooted in purpose, grounded in research-based practices, and focused on creating meaningful impact.

Our Values Anchor This Guide:

- Human dignity is the foundation of institutional excellence.
- Fairness is a nonnegotiable standard.
- Opportunity is a shared responsibility.
- Merit is a strategic foundation, not a barrier.
- Collective impact is the outcome of shared will and engagement.
- Sustainability is both a strategy and an outcome.
- Systemic change is the only path to sustainable progress.

This guide aims to embrace what is possible when we do the hard, structural work to move from thoughtful intention to strategic action.

A Systems-Based Approach

No single office or individual can carry out this work alone. Real systems change requires a whole-institution approach — one that aligns leadership, policy, budget, people, and culture. This guide offers approaches for such alignment. It connects strategic priorities with the daily decisions that shape campus life and provides practical levers for change: from hiring, pedagogy, and student success, to communications, compliance, and community partnership — to build new futures where everyone has the opportunity to be successful.

Navigating the Moment

We understand the challenges: resistance, shifting legal constraints, and a lack of support. Yet even in the face of these obstacles, we also see the opportunity to lead with purpose. This resource was created by higher education leaders for higher education leaders and beyond so that they can navigate the current environment and set the stage for future success. It is a resource guide for your thought leadership within your own institutions as they navigate what comes next.

Rooted in Values is designed for presidents, provosts, human resources leaders, student affairs professionals, legal teams, faculty, and those beyond higher education working to build institutions across all sectors that support fairness, opportunity, and success for all. Whether you are new to this work or a seasoned professional, this resource is our best thinking on a set of foundational principles and strategies being deployed thus far.

How To Use This Guide

This guide contains several sections that support structural change in higher education. Each section can be read on its own or alongside others, depending on the user's interests or needs. While the document brings multiple topics together, each stands independently.

About This Guide

This is a living document. It will evolve as legal, political, social, and institutional contexts change. We will update the guide as we continue to equip higher education leaders with the tools to champion fairness, opportunity, and access for everyone.

EXECUTIVE SUMMARY

We are living through a pivotal moment for higher education. The social, political, and legal environment has shifted dramatically, demanding that institutional leaders act with clarity, courage, and conviction. What has not changed is the mission: to create colleges and universities where fairness, opportunity, and access are embedded into the very fabric of institutional life, and where every student, educator, and employee has the chance to thrive. This guide offers a roadmap for leaders committed to advancing that mission while building sustainable systems for the future. The guide offers research-informed strategies, practical tools, and actionable levers that translate intention into institutional effectiveness now and into the future. It provides leaders with actionable strategies for embedding fairness into the structures, policies, budgets, and cultures of their institutions. Together, they articulate a systems-based approach for structural change: aligning leadership, governance, resources, and accountability mechanisms so that mission and practice reinforce one another.

Institutional Structures and Leadership

The foundation of structural change begins with governance and leadership. Institutions must recognize that outdated systems often perpetuate inequities not by intent but by inertia. The charge to leaders — including boards, presidents, provosts, deans, and chairs — is to realign structures, decision-making processes, and communications with mission and public purpose. The section underscores that progress requires:

- Clear alignment between mission, strategy, and leadership accountability.
- Regular governance reviews to dismantle systemic barriers.
- Leadership pipelines and mentoring programs to cultivate untapped talent.
- Transparent communication practices and ongoing climate assessments.

When institutions embed fairness into structures and accountability into leadership, they strengthen institutional integrity and public trust.

Policies, Procedures, and Governance

Policies form the operating code of higher education. Done well, they protect dignity, ensure clarity, and advance opportunity. Done poorly, they create barriers and erode trust. Institutions are called to:

- Audit policies regularly through cross-functional teams.
- Prioritize transparency, alignment with mission, and human-centered design.
- Focus reforms on high-impact areas such as admissions, hiring, financial aid, tenure, and compliance.
- Engage governance bodies and diverse stakeholders in co-designing policy.

Policy reform is a core strategy for sustainability, risk mitigation, and public accountability.

Resource Allocation and Intentional Budgeting

Budgets are moral documents that reveal institutional priorities. Leaders are urged to treat intentional budgeting not as charity, but as a strategic investment in institutional vitality. Key moves include:

- Cross-functional budget reviews guided by data on impact and outcomes.
- Protected and sustained funding for student support, faculty development, and community engagement.
- Clear alignment between planning processes and budget decisions.
- Guardrails to prevent disproportionate cuts to opportunity and fairness initiatives.

This section emphasizes that where institutions spend signals what they believe in; sustained impact requires sustained investment.

Student Success and Academic Opportunity

Student success is an institutional responsibility, not a departmental function. Leaders must establish a shared definition of success and align systems, resources, and policies to remove barriers and foster achievement. Critical actions include:

- Using disaggregated data to track outcomes and identify gaps.
- Investing in inclusive pedagogy, holistic support systems, and adequate staffing.
- Integrating student feedback and governance participation into decision-making.
- Elevating student success as a measure of institutional excellence and sustainability.

Institutions must move beyond remedial interventions toward systems-level transformation that ensures every student thrives.

Curriculum and Pedagogy for a Changing World

Curriculum and pedagogy shape not only academic outcomes but also institutional identity. Leaders are challenged to ensure that course content, teaching methods, and assessment strategies reflect fairness, access, and academic rigor. Strategic levers include:

- Establishing curricular review structures tied to mission and values.
- Defining shared learning outcomes embedded across programs.
- Investing in faculty development for culturally responsive, adaptive teaching.
- Recognizing and rewarding innovation in teaching and curricular design.

The guidance positions responsive teaching and inclusive curriculum as essential precursors to academic excellence and future readiness.

Hiring, Retention, and Advancement

An institution's workforce reflects its systems of access and advancement. Outdated hiring and promotion processes perpetuate inequities and undermine capacity. Leaders are called to:

- Standardize hiring and evaluation tools to ensure fairness.
- Use applicant flow and pay equity data to monitor outcomes.
- Provide mentoring, onboarding, and leadership pipelines for career advancement.
- Embed accountability by requiring documentation and transparency in reviews.

Treating hiring and advancement as strategic tools builds institutional excellence, reduces legal risk, and secures competitive advantage.

Institutional Programming and Outreach

Programming is a strategy for building institutional capacity. Institutions should design programs that are purpose-driven, mission-aligned, and co-created with internal and external stakeholders. Effective practices include:

- Establishing interdisciplinary councils to guide programming.
- Creating tiered learning pathways for leaders, faculty, staff, and students.
- Integrating programming into annual calendars and strategic planning.
- Building incentives and recognition into participation.

When institutions treat programming as strategic capacity building, they accelerate alignment, innovation, and trust.

Education, Training, and Employee Development

Learning must extend to faculty, staff, and administrators. Training is framed not as compliance or awareness, but as mission-critical professional development that strengthens decision-making, collaboration, and institutional performance. This work requires:

- Customizing content by role and responsibility.
- Building internal expertise to sustain efforts.
- Incentivizing participation through recognition and advancement pathways.
- Evaluating programs for impact beyond attendance metrics.

Institutions that invest in their people equip themselves to adapt and thrive.

Campus Climate and Culture

Culture and climate are both barometers and drivers of institutional health. Effective leaders commit to:

- Regular, validated climate assessments with disaggregated data.
- Interventions based on survey results and listening sessions.
- Auditing campus narratives, traditions, and symbols.
- Embedding climate goals into planning, onboarding, and evaluations.

A thriving climate is built through rigor, compassion, and accountability.

Admissions and Access

Admissions and access decisions reveal an institution's values and its commitment to opportunity. In a shifting legal environment, leaders must ensure that enrollment practices are transparent, sustainable, and mission-driven. Key strategies include:

- Eliminating legacy preferences and other structural barriers.
- Adopting holistic review and context-based admissions frameworks.
- Expanding clear, accessible transfer and pipeline pathways.
- Ensuring equitable participation in high-impact experiences such as research, internships, and leadership programs.

Admissions and access are not simply administrative functions; they are public declarations of who institutions serve and how they define excellence.

Strategic Communications and Storytelling

Communications shape how institutions are perceived, trusted, and understood. Leaders must move beyond siloed messaging to embed strategic communications across leadership, operations, and community engagement. Critical actions include:

- Building message platforms centered on fairness, opportunity, and institutional mission.
- Preparing rapid-response systems to counter misinformation and manage crises.
- Highlighting student, faculty, and staff stories alongside institutional data.
- Aligning digital, print, and in-person communications to ensure consistency.

Strategic storytelling protects credibility, reinforces mission clarity, and ensures that institutions speak with one clear and trusted voice.

Data, Measurement, and Institutional Learning

Progress requires evidence, and evidence requires systems that drive institutional learning. Leaders are called to treat data as a resource for transparency, accountability, and continuous improvement. Priority actions include:

- Disaggregating student, faculty, and staff outcomes to identify barriers.
- Embedding dashboards and metrics into planning and accreditation cycles.
- Pairing quantitative analysis with qualitative insights from surveys and focus groups.
- Using results to inform resource allocation, policy, and leadership decisions.

When data are used for learning and adaptation, they transform from compliance tools into engines of institutional resilience.

Legal Literacy and Risk Navigation

Lasting structural change depends on policies that are legally sound and mission-consistent. Leaders must strengthen legal literacy across governance, administration, and campus operations. Essential steps include:

- Consulting counsel early in the design of policies and practices.
- Training leaders and managers to integrate legal considerations into daily decisions.
- Documenting processes to demonstrate transparency and fairness.
- Regularly reviewing admissions, hiring, and governance policies for legal compliance.

Legal literacy equips institutions to advance fairness and opportunity while mitigating risk and sustaining credibility.

External Partnerships and Community Anchoring

Institutions cannot thrive in isolation. External engagement reinforces mission, builds trust, and expands opportunity for students and communities alike. Effective strategies include:

- Building partnerships with K-12 systems, community colleges, and local organizations.
- Aligning collaborations with workforce needs and civic priorities.
- Moving beyond transactional outreach to shared accountability frameworks.
- Elevating mutual benefit in partnerships with employers, civic leaders, and community groups.

When partnerships are treated as a core strategy, institutions strengthen their public purpose and sustain long-term relevance.

Future Planning and Institutional Resilience

Resilience requires anticipating change, not just reacting to it. Leaders must embed futures thinking into planning, governance, and budgeting to ensure fairness and opportunity endure across shifting contexts. Key practices include:

• Conducting scenario planning and demographic forecasting.
• Integrating resilience goals into strategic and financial plans.
• Using risk assessments to prepare for political, cultural, and economic shifts.
• Anchoring future planning in mission and public purpose.

Institutions that plan for resilience ensure they remain adaptable, mission-true, and sustainable for generations to come.

Monitoring and Continuous Improvement

Change is sustained when it is measured, refined, and adapted over time. Leaders are urged to make monitoring a core leadership function rather than an add-on. Critical actions include:

• Embedding assessment into accreditation, planning, and budget cycles.
• Establishing clear metrics and transparent progress reports.
• Using feedback loops to adjust strategies and share outcomes.
• Documenting processes to reinforce accountability and build trust.

Continuous improvement protects institutional gains, ensures credibility, and keeps structural change aligned with mission and purpose.

This guide makes a singular point: Structural change is not the responsibility of a single office. It requires systems thinking, courageous leadership, and sustained alignment of mission, policy, resources, and accountability. For presidents, provosts, trustees, and other leaders, this is a call to embed fairness and opportunity into the structures of institutional life so that colleges and universities remain resilient, future-facing, and unwavering in their public mission and values. Structural change happens when leadership, policy, budget, people, and culture are aligned around a shared mission and purpose.

INSTITUTIONAL STRUCTURES AND LEADERSHIP

Introduction

We are living in a time of heightened scrutiny and shifting expectations when it comes to the pursuit of universal access and opportunity in higher education. This section on institutional structures and leadership is designed to support leaders in navigating these challenges with clarity and conviction by centering fairness, public mission, and structural alignment.

Purpose

To advance fairness, access, opportunity, engagement, and success across higher education, we recommend that institutions evaluate and strengthen the systems that shape access, participation, and advancement. This begins with honest reflection and sustained leadership at every level — from trustees, chancellors, presidents, and provosts to deans and department chairs. At every level of leadership there must be a shared understanding that structural barriers often persist not because of intentional exclusion, but because outdated policies, procedures, and practices no longer serve the mission.

The goal is to realign policies, practices, procedures, and decision-making processes with the institution's stated mission, values, and public purpose. Moving from the status quo to bold, evidence-based efforts rooted in systems thinking, strategic alignment, and shared accountability creates environments where everyone can thrive.

Key Strategies and Levers

Mission and Leadership Alignment	Ensure the institution's mission, vision, and strategic plan reflect fairness, opportunity, access, belonging, and public service. Integrate these values into leadership evaluations, incentives, and reporting.

Structural and Governance Review	Conduct regular audits of policies, practices, and programs (admissions, hiring, retention, procurement, etc.) to identify systemic barriers, and strengthen governance by revisiting board and committee appointments for broad representation and transparency.
Talent Development and Advancement	Build leadership pipelines and mentoring programs to cultivate untapped faculty and staff talent and promote career growth.
Communication and Culture	Align messaging with institutional values, ensure transparency, and make climate assessment routine to reinforce accountability and trust.

Real-World Example

When an Ivy League institution appointed a new president, the university was struggling with fragmented departments, unclear policies, and a lack of direction that hindered progress. The new institutional leader immediately initiated a comprehensive review of the university's governance framework. The president established clear organizational structures, defined roles, and streamlined communication channels among faculty, staff, and administration. Additionally, the leadership team facilitated open forums where faculty could shape policy, while aligning with a strategic vision focused on academic excellence and community engagement. The president emphasized accountability, ensuring that every department adhered to coherent standards and contributed to shared goals.

Under this renewed institutional structure and leadership, the university saw remarkable improvements. Student retention rates improved, interdisciplinary research accelerated, and external partnerships expanded. Further, relationships with the surrounding community improved. More importantly, the university culture shifted from disjointed silos to a collaborative learning community.

Implementation Guidance

- **Start with Structure, Not Just Training**
  While workshops and learning opportunities are valuable, sustainable change begins with examining the ways in which systems, policies, procedures, and practices impact outcomes, how decisions are made, and who makes them.

Communicating Structural Fairness and Accountability as Leadership Strategy

- **Presidents and Trustees:** Emphasize how structural alignment enhances institutional effectiveness and public trust.

- **Faculty and Academic/Administrative Leaders:** Highlight improvements in student access and success, retention, and shared governance.

- **Finance and Legal Teams:** Underscore risk mitigation, transparency, and operational consistency.

- **Human Resources and Staff:** Connect to clear pathways for advancement, fairness, and role clarity.

Key Message: Aligning institutional structures with fairness and accountability strengthens leadership impact and institutional integrity.

- **Build Internal Coalitions**
  Empower cross-departmental teams to work together on institutional alignment.

- **Use What You Have**
  Align existing processes like strategic planning, accreditation, and budget cycles with these structural goals. Do not create a separate track for these considerations. Embed universal access and opportunity, and any necessary changes in current practices and procedures.

- **Incentivize Progress**
  Tie effective barrier-removal and outcomes to leadership evaluations and budget decisions. Celebrate wins and develop consequences for inaction.

Legal Considerations

When shifting institutional structures to align with institutional goals that are transparent and fair, provide access, and opportunities, institutions must ensure any shifts are compliant with all applicable laws, shared governance requirements, and any state and/or federal mandates related to structural oversight. Any realignment of leadership roles should be reviewed by legal counsel for implications related to contracts, collective bargaining agreements, nondiscrimination laws, and implementing regulations. Careful analysis, transparency, and documentation are essential to ensure the lawful pursuit of universal access and opportunity.

Closing Comments

The pursuit of fairness and opportunity for all is rooted in institutional character. It is incumbent that efforts to achieve fairness, create opportunity, and the outcomes associated with this work comply with the law. It is about mission, values, who we are, who we serve, and how we serve them. When we embed fairness into how decisions are made, how leaders are held accountable, and how systems operate day to day, we create a higher education ecosystem that is sustainable, future-facing, and true to its purpose.

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POLICIES, PROCEDURES, AND GOVERNANCE

Introduction

Policies and procedures are the operating code of higher education institutions. They guide how we admit students, hire employees, resolve conflicts, distribute resources, engage with broader communities, and define excellence. Whether written in handbooks or embedded in workflows, policies and practices shape everyday decisions and their consequences.

In today's climate, policies must do more than comply with regulations. They must be more closely evaluated for whether they support institutional viability and sustainability, advance opportunity, and remove unnecessary barriers for everyone. Although those charged with advancing fairness and structural change may not be directly responsible for setting institutional policy, it is imperative that these leaders partner with legal, governance, and other experts where possible to drive these conversations. As we reframe universal access and opportunity work for the current moment and the future, policy and procedure analysis becomes critical for clarity, transparency, and shared accountability.

Purpose

To ensure institutional policies and procedures support fairness, access, and opportunity for all members of the campus community. This includes reviewing policies, practices, and programs for their real-world impact, aligning them with institutional mission and values, and creating clear mechanisms for input, accountability, and continuous improvement.

As institutions move beyond crisis-driven responses toward sustainable fairness-based infrastructures, they must shift to develop policies and practices that reflect broad participation, shared responsibility, and public trust.

Key Strategies and Levers

Policy Audits and Feedback

Conduct regular reviews of student, human resources, and academic policies using clear, objective criteria that promote fairness and stakeholder input to assess clarity, consistency, and differential outcomes.

Transparent and Aligned Review Cycles

Tie policy review to existing planning or accreditation timelines. Publish updates with clear rationales, and require departments to demonstrate how core policies advance fairness, opportunity, and institutional mission.

High-Impact Priorities

Focus early efforts on policies with the greatest influence on access and culture, such as admissions, hiring, financial aid, scholarships, discipline, compliance with Title VI, Title VII, Title IX, ADA, tenure, promotion, and compensation.

Participatory Governance

Engage representative committees to co-design or revise policies, ensuring diverse perspectives shape processes that affect the entire university community.

Real-World Example

A highly regarded HBCU realized that chaos was quietly brewing beneath the surface after a few years of unprecedented growth. Student applications had increased by 60% and enrollments soared as a result. This growth bolstered the self-esteem of the university. Alumni were excited and engaged. However, the needs of a growing student population and not enough infrastructure and resources to support them led to confusion over responsibilities, inconsistent academic standards, delays in decision-making, and slow front-end service responses. The administration realized the college risked losing its reputation and its new students if changes were not made swiftly.

The policies and procedures review process took about a year to complete with the voices and feedback from students, faculty, and staff playing a pivotal role in the resulting improvements. The changes were transformational with some

Communicating the Role of Policy in Structural Change

- **Board Members and Executives:** Highlight compliance, risk management, and mission alignment.
- **Faculty and Shared Governance Leaders:** Emphasize clarity, fairness, and academic excellence.
- **Staff and HR Professionals:** Underscore procedural fairness and transparency in operations.
- **Students:** Advocate for institutional responsiveness and equitable support.

Key Message: Clear and inclusive policies are the backbone of a trustworthy and equitable institution that works for everyone.

noting the changes as "remarkable." Administrative bottlenecks were removed, academic standards became consistent, and compliance with accreditation requirements was streamlined. Faculty and students felt more confident knowing there were fair, consistent policies and procedures in place. Governance bodies, with defined charters, became forums for collaborative problem-solving rather than gripe sessions. This HBCU's journey highlights that policies, procedures, and governance in higher education are not mere formalities. They establish trust, order, and fairness, enabling institutions to operate efficiently, adapt to challenges, and fulfill their educational mission with integrity and excellence.

Implementation Guidance

- **Start with Cross-Functional Teams** Form review groups that include legal counsel, human resources, academic affairs, student affairs, campus safety, and health systems, where applicable, to ensure policy decisions reflect diverse expertise and constituencies.
- **Center the End-User Experience** Use human-centered design principles to walk through how students, staff, and faculty actually experience institutional policies and where gaps or confusion arise.
- **Clarify Processes with Clear Guidance and Intended Outcomes** Standardize areas with subjective interpretation (e.g., grade appeals or flexible work arrangements) to reduce bias and inconsistency.
- **Document and Share Learnings** Keep an internal log of which policies were reviewed, what was found, and what actions were taken. Use this data to guide institutional learning and public accountability.

Legal Considerations

We recommend that policy reform be undertaken in consultation with legal counsel to ensure alignment with federal and state nondiscrimination laws and regulations, the First Amendment and other constitutional protections, and

obligations under FERPA, ADA, Title IX, and other legally mandated requirements. Changes focused on fairness and opportunity should be discussed in the context of transparency, access, and institutional effectiveness — and be clear that such efforts (in theory and in practice) do not provide unfair advantages to any group. Ensure processes for policy review are well-documented and align with shared governance practices.

Closing Comments

Policy reflects who we are and what we prioritize. Done well, it creates clarity, protects dignity, advances opportunity, and provides a solid foundation. Done poorly, it becomes a barrier to access, opportunity, and equitable outcomes. This work is centered on intentionality. It's about building systems that are transparent, consistent, and reflective of institutional mission and values. For institutions seeking to future-proof their commitments, policy reform is absolutely essential.

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RESOURCE ALLOCATION AND INTENTIONAL BUDGETING

Introduction

Budgets are moral documents. They reveal where an organization places its priorities, and who it sees as essential to its success. In a climate where institutions are under increasing financial pressure and scrutiny, decisions about resource allocation must be made with clarity, fairness, and long-term strategy in mind.

Accessibility, opportunity, success, and sustainability cannot be achieved without investment. Strategic planning without corresponding funding is a broken promise. This section on resource allocation and intentional budgeting is designed to help leaders ensure that resource allocation reflects stated commitments to mission, fairness, student success, and institutional sustainability.

Purpose

To align institutional spending with goals that promote opportunity, access, and success for all. This includes ensuring that community engagement, student and employee support systems, and accessible infrastructure are resourced adequately and sustainably.

Reducing investments in areas that support the full spectrum of communities that enhance access among all student, faculty, and staff groups, and improve retention for everyone carries long-term costs. These costs include reputational harm, talent loss, and decreased enrollment. Intentional resource allocation that supports all constituent groups is not just a financial decision. It is a strategic imperative.

Key Strategies and Levers

Budget Reviews and Data-Informed Decisions	Implement cross-functional audits and use institutional research and climate data to ensure investments align with goals, demonstrate impact, and target the greatest areas of need.
Protected and Dedicated Funding	Safeguard resources for community engagement, mentoring, and culturally responsive pedagogy through ongoing, mission-driven budget commitments.
Leadership and Shared Governance	Empower governance groups representing faculty, students, and staff with executive-level participation and resources to drive institutionwide strategies.
Aid, Compensation, and Advancement	Prioritize financial aid, fair pay, and equitable workload distribution while aligning capital campaigns and scholarships with institutional goals and alumni engagement.

Real-World Example

Despite pressure from the state to roll back support based on diversity, equity, inclusion, and affinity, a public land-grant, flagship university in the South made the decision to ensure that resources for all students, faculty, and staff health and well-being — including infrastructure and accessible spaces — were prioritized. The university became a partner campus with an international organization whose stated mission is to "embed health into all aspects of campus culture and to lead health promotion action and collaboration locally and globally" (healthpromotingcampuses.org). As a member institution, the university received a framework, common language, climate assessments, and principles to promote health and well-being on campus.

Communicating Intentional Budgeting as a Strategic Financial Decision

- **Trustees and CFOs:** Emphasize return on investment, enrollment yield, and reputational value.
- **Provosts and Deans:** Link to faculty development, curricular quality, and student persistence.
- **Advancement Teams:** Frame as a donor priority aligned with mission and legacy.
- **Students and Staff:** Reinforce commitment to student success and fairness in resource distribution.

Key Message: Intentional budgeting is a strategic investment in institutional sustainability.

In order to actualize the goals of the charter, the university allocated funds to form an office, hire a director and staff, and support programming. Since joining, the university has incorporated health and well-being, including universal design, into its values and strategic vision to center the mental, physical, and emotional health of the campus. This example demonstrates the critical importance of intentional resource allocation and budgeting in higher education. These practices serve as proactive measures to safeguard the campus during uncertain times while preserving higher education as a public trust and a public good.

Implementation Guidance

- **Audit and Benchmark**
  Begin with a clear picture of current spending. Compare allocations for student, faculty, and staff success and support services with peer institutions or sector benchmarks.

- **Connect Budget to Planning**
  Require that all units submitting strategic plans include intentional budget requests designed to support all demographic groups, and review those requests for consistency with institutional goals.

- **Treat Universal Access as Strategy, Not Charity**
  Shift messaging and decision-making from a cost framework to a value-added lens, focusing on retention, reputation, and readiness.

- **Create Feedback Loops**
  Involve students, staff, and faculty in determining where additional investment is needed and evaluate how spending impacts experience and success.

- **Protect Core Investments**
  During budget reductions, establish guardrails to prevent disproportionate cuts to opportunity and fairness initiatives, student success, and community engagement units.

Legal Considerations

All resource allocations must comply with constitutional and state-mandated restrictions on race or gender-based decision-making, particularly in public institutions. Budgets should be rooted in mission-aligned criteria such as student success, workforce needs, research efforts, or institutional performance. Documentation, consistency, and the use of strategies that benefit all under-resourced communities are essential.

Closing Comments

If higher education is truly a public good, then its resources must be allocated in ways that advance the success of the public as a whole — not just a privileged few. Where an institution invests signals who and what it believes in. Sustainable work around fairness and opportunity cannot be done on borrowed resources or unfunded mandates.

This is the moment to be clear-eyed and courageous. Sustainable institutions invest in the people and programs that ensure long-term success for both individuals and institutions alike.

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STUDENT SUCCESS AND ACADEMIC OPPORTUNITY

Introduction

Higher education institutions are measured by who they enroll and by how well they support every student's ability to succeed. While many institutions have increased access, success remains uneven. These disparities often stem not from a lack of student potential but from barriers embedded in institutional culture, policies, resources, and pedagogy.

To ensure every student has the opportunity to thrive, colleges and universities must adopt a comprehensive approach to student success that is data-informed, structurally grounded, and responsive to student experience. This work is not remedial; it is transformative.

Purpose

To establish the structures, systems, and strategies that ensure academic success and persistence for all students by addressing systemic barriers, promoting culturally responsive teaching and support, and creating learning environments that foster access and achievement.

Student success must be a shared institutional responsibility, integrated across academic affairs, student services, and administrative leadership. It is not and cannot be dependent on one office or individual. When implemented effectively, these student success strategies improve retention, strengthen outcomes, and increase institutional success.

Key Strategies and Levers

Define and Measure Student Success	Establish a shared definition of student success across leadership, planning, academics, and student services, embedding it in mission statements, performance metrics, and disaggregated data on outcomes such as course completion, retention, and graduation rates.
Foster Inclusive Teaching and Access	Invest in faculty development for culturally responsive and trauma-informed pedagogy, and strengthen programs, spaces, and staffing that connect access to academic momentum and institutional success.
Align Resources and Policies with Priorities	Ensure student success offices are adequately staffed and funded, and review admissions, financial aid, housing, and conduct policies to remove barriers and increase clarity, flexibility, and fairness.
Integrate Holistic Support Systems	Connect advising, tutoring, mental health services, and cultural programming to create wraparound supports across academic, social, and personal domains.
Elevate Student Voices	Establish regular feedback loops through surveys, focus groups, and shared governance to ensure student perspectives shape institutional decision-making.

Real-World Example

The post-COVID student achievement slump was a well-documented phenomenon that forced many universities to be innovative in their approach to teaching, learning, and student engagement. A large flagship university in the Southwest demonstrated a strong commitment to student success and academic opportunity through its hybrid learning initiative launched in 2021. This

Communicating Student Success as a Shared Imperative

- **Presidents and Trustees:** Frame as a measure of institutional excellence and financial sustainability.
- **Faculty and Academic Affairs:** Emphasize alignment with culturally responsive pedagogy and improved learning outcomes.
- **Student Affairs Professionals:** Highlight the power of wraparound support in fostering success.
- **Students:** Reinforce that the institution is advocating for removing barriers, not lowering expectations.

Key Message: Every student's success is an institutional priority.

innovative model combined in-person and synchronous online instruction to optimize access to the excellent quality education students expected, while also providing flexibility regardless of a student's location or personal circumstances. This approach specifically supported nontraditional students, working adults, and those with caregiving responsibilities, ensuring equitable academic opportunity and monitoring outcomes during uncertain times.

Recent university culture and climate data noted the success of the program and highlighted even more impactful ways to engage students and meet them where they are. This university's experience highlights how adaptable instructional models combined with targeted student support effectively advance both student success and academic opportunity, particularly amid ongoing uncertainties in higher education.

Implementation Guidance

- Conduct, for example, an institutional Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis focused specifically on academic opportunity and student success.
- Map the student experience from entry to graduation to identify friction points, service gaps, barriers to full access, and critical interventions.
- Develop a student success dashboard that includes disaggregated data trends and is shared with academic, student support, and administrative units.
- Embed universal access and opportunity outcomes into academic unit reviews, faculty evaluations, and strategic enrollment planning.
- Incentivize high-impact teaching and advising through recognition, funding, and professional development opportunities.
- Establish regular audits of policies and practices that may inadvertently disadvantage select student groups.

Legal Considerations

Academic support must comply with nondiscrimination laws. Institutions can lawfully offer programs that focus on high-need populations using race-neutral criteria (e.g., first-generation status, income, or academic preparation). Programs must remain open to all students who meet objective eligibility criteria.

Closing Comments

Every institution of higher education must ensure that its structures, culture, and practices are aligned with the goal of helping all students thrive. This means moving beyond well-meaning programs and into sustained, systems-level transformation.

When students succeed — particularly when they feel seen, heard, supported, and challenged in meaningful ways — institutions and students thrive.

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CURRICULUM AND PEDAGOGY FOR A CHANGING WORLD

Introduction

What we teach and how we teach it shapes student identity, access, and long-term success. Curricula and pedagogy are powerful levers in advancing opportunity, affirming student experience, and promoting intellectual rigor. Yet, too often, curricula and pedagogy can reflect a narrow set of perspectives and assumptions that limit learning across an array of student identity.

Higher education institutions must continuously assess whether their teaching approaches, course content, and learning environments support the full academic potential of all students. This requires more than a one-time review. It demands a sustained commitment to reflective practice, faculty development, curricular innovation, and alignment with the institution's mission and public purpose.

Purpose

To ensure that curricula and pedagogy are designed and delivered in ways that support high-quality learning environments where all students can thrive. This includes evaluating teaching practices, course content, and assessment strategies through a lens of fairness, access, and academic excellence.

By investing in curriculum design and faculty development, institutions demonstrate a commitment to academic rigor that reflects the diversity of student experiences, disciplines, and societal needs.

Key Strategies and Levers

Establish Structures for Curricular Review	Create a curricula and pedagogy task force and align course approval, program review, and academic self-studies with student success and fairness goals.

Define and Integrate Learning Outcomes	Develop shared outcomes related to student success and embed them into general education, new course development, and program review processes.
Invest in Faculty Development	Provide ongoing professional learning through workshops, communities of practice, and expert-led sessions on adaptive pedagogy, culturally responsive teaching, and evidence-based instruction.
Promote Innovation and Shared Experiences	Support faculty in redesigning courses and creating common learning opportunities for all students, particularly first-year and transfer students, around issues of identity, access, and fairness through interdisciplinary, discussion-based learning.
Recognize and Reward Contributions	Integrate teaching and curricular innovation into faculty evaluation, promotion, and tenure to elevate the value of this work.

Real-World Example

Like many institutions, a flagship university in the western U.S. recognized that its curriculum and teaching practices often reflected a narrow set of perspectives, which limited learning opportunities and failed to fully support the academic potential of all students. The university faced many challenges, including an outdated curriculum, addressing biases in course materials, ensuring teaching practices served all students, and aligning professional development and curriculum review with institutional goals around fairness, access, opportunity, and academic excellence.

The university implemented multifaceted curriculum reform through a series of coordinated strategies to address the challenges and transform its curriculum and pedagogy. First, in partnership with the provost, faculty, and the institution's Center for Teaching Excellence, it undertook a systematic review of course content to identify and remove narrow representations and implicit biases. Next, the institution made significant investments in professional development, organizing workshops and events focused on revising the curriculum and implementing new teaching practices. The university allocated new resources to expand curricular

Teaching for Universal Access and Opportunity: A Natural Precursor to Academic Innovation

- **Academic Affairs and Academic Unit Deans/Chairs:** Frame as a measure of institutional excellence and financial sustainability.
- **Faculty:** Emphasize alignment with culturally responsive pedagogy and improved learning outcomes.
- **Students:** Articulate how intentionally designed learning experiences enhance lives and prepare them for impact.
- **Boards and External Audiences:** Showcase excellence and relevance in education.

Key Message: Culturally responsive curricula and pedagogy drive academic quality and future-readiness.

offerings and support faculty in adopting inclusive pedagogical approaches, and offered robust training to ensure that classroom environments were welcoming and supportive for all students. Lastly, the university established a continuous feedback loop from students to inform ongoing curriculum changes and ensure that reforms were meeting their needs.

These changes incorporated a wide range of perspectives, histories, and voices, making learning more relevant and accessible to all students. Faculty became more engaged in reflective practice and ongoing professional development, leading to sustained improvements in teaching effectiveness. Early evidence suggested increased student engagement, a greater sense of belonging, and improved academic outcomes for all students. Most importantly, these efforts led to an institutional commitment that is designed to ensure curriculum and pedagogy remain aligned with the university's mission. By incorporating a broader world view, investing in faculty, and embedding continuous assessment, this Western university created a more rigorous learning environment that prepares students for success in a complex and changing world.

Implementation Guidance

- Start with a scan of general education and core curricula to assess the presence of learning goals and diverse perspectives that reflect the institution's vision and values.
- If budgeting allows, provide stipends, time, or release opportunities, when possible, for faculty to participate in course redesign cohorts or curriculum institutes.
- Create department-level conversations that connect responsive teaching to student outcomes, retention, and engagement.
- Ensure instructional design support is available and aligned with the institution's goals for pedagogy that taps the potential of all students.
- Encourage cross-disciplinary collaborations that model engaged learning and expand curricular breadth.
- Use student feedback, success data, and peer review as tools for continuous course and teaching improvement.

Legal Considerations

Curricular decisions must be considered in the context of academic freedom, but must also respect institutional neutrality and avoid mandatory diversity statements and other forms of compelled speech. Pedagogy should be positioned as evidence-based practice, not ideological advocacy. Curricula changes should be transparently documented, faculty-led, and justified by disciplinary relevance and student learning outcomes.

Closing Comments

Curriculum and pedagogy are among the most visible and lasting expressions of an institution's values. They reflect what we believe students deserve to learn, how we believe they learn best, and whose voices we center in the process. When we invest in responsive teaching and curriculum design, we affirm the academic promise of all students. This happens by ensuring every student has access to the tools and environment to realize their highest aspirations.

Institutions that align curricula and pedagogy with their communities and the complexity of the world not only support student success, they elevate academic excellence and institutional impact for generations to come.

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HIRING, RETENTION, AND ADVANCEMENT PRACTICES

Introduction

We must recruit, hire, support, and retain the people who power our institutions. It's not enough to signal commitment; we must embed fairness, transparency, and accountability into every step of the talent lifecycle. That means eliminating outdated systems that produce differential outcomes that are not supported by objective criteria, and replacing them with structured approaches and processes that support opportunity and advancement for all.

The work of advancing fairness and opportunity in hiring, retention, and promotion is both complex and urgent. Some faculty and staff continue to face barriers to access, recognition, and leadership. These patterns didn't emerge by accident; they are the product of longstanding systems, policies, practices, and assumptions that must be reexamined and replaced. Leaders at every level must ask themselves: Are we upholding systems that create differential outcomes and disparity, or are we actively dismantling them to build something better?

Purpose

To design and implement fair, transparent, and effective hiring, retention, and promotion systems that remove structural barriers, build institutional capacity, and support the advancement of a skilled and talented workforce across all areas of higher education, and enhance the reputation of the institution.

Key Strategies and Levers

Conduct a comprehensive review of existing policies and procedures	Identify and address structural and operational barriers in recruitment, search processes, hiring, retention, and promotion across faculty and staff roles.

Key Strategies and Levers *continued*

Develop a structured approach to search processes	Focus decision makers on position-relevant criteria, recruiting an applicant pool that reflects open access, and complies with all applicable federal and state laws. Develop search committee guidance, job description templates, and position announcements that emphasize institutional mission and values and support responsive candidate engagement and demographics.
Analyze applicant flow data	Where available, use disaggregated data to assess movement through each stage of the hiring process including application, initial screening, interview, and offer. Address gaps or inconsistencies.
Build capacity across units	Provide ongoing professional development for hiring managers and provide clear guidelines for search committees on fair hiring practices, legal considerations, and job related decision-making.
Create accountability systems	Create a standardized process and require documentation from search, annual reviews, and promotion committees outlining processes used and decisions made. Hold departments and divisions responsible for outcomes.
Examine retention and advancement patterns	Partner with an external partner, when possible, to conduct regular reviews of hiring, annual performance reviews, promotion, tenure, reappointment, and fair pay decisions. Use climate surveys, focus groups, and exit interviews to surface systemic issues.

Strengthen staff and faculty support systems	Establish onboarding, mentoring, and leadership development programs that foster access and growth across all demographics and role types.
Ensure data transparency	Share high-level hiring, pay, and retention data with appropriate units to foster awareness and support shared accountability.

Real-World Example

A case study published in 2024 examined four research-intensive universities — pseudonymously named Lakewood, Riverdale, Edgewood, and Charming — that participated in the federally funded "Promoting Opportunity & Advancement Alliance" (POAA). These institutions serve as leading examples of how to solve the challenge of outdated and inequitable hiring, retention, and advancement systems. The institutions implemented key strategies to dismantle barriers and build systems that support fairness, opportunity, and excellence for all members of the academic community.

These strategies included several shifts around hiring and promotion, interview protocols, salaries and advancement, and professional development. The POAA universities conducted thorough audits of existing hiring, retention, and promotion policies to identify both structural (e.g., decentralized cultures) and active barriers (e.g., resistance from faculty or administrators). Outdated or ambiguous criteria were replaced with clear, objective, and position-relevant standards for evaluation. Search committees were required to use structured interview protocols and standardized evaluation rubrics for all candidates, ensuring that decisions were based on consistent, job-related criteria rather than subjective impressions. Job descriptions and position announcements were revised to emphasize mission, values, and commitment to access, opportunity, and fairness. Ongoing training was provided for hiring managers and search committees on fair hiring practices, legal considerations, and the use of structured tools. Mentoring, onboarding, and leadership development programs were established to support the advancement of all faculty and staff. Additionally, the universities implemented systems that allowed them to identify differential outcomes in recruitment, advancement, and compensation, and designed targeted interventions to close those gaps. Further, departments and divisions were held accountable for outcomes, with standardized documentation required for all hiring, annual review, and promotion decisions. High-level hiring, pay, and retention data were shared to foster awareness and support shared accountability.

How to Message Open Access Hiring and Promotion as a Competitive Advantage

- **Trustees and Executives:** Link to legal risk mitigation and talent optimization.
- **Faculty:** Highlight how fair hiring preserves academic standards while broadening the conditions for excellence.
- **Staff:** Reinforce access to opportunity, mentorship, and transparency in advancement.
- **External Audiences:** Showcase a strategic approach to people and performance.

Key Message: Fair hiring and promotion elevate institutional quality by ensuring access to top talent.

Lastly, regular pay equity audits were conducted, dedicated funds were set aside to correct differential outcomes, and transparent promotion and tenure processes were implemented, with clear criteria and communication to faculty and staff.

The POAA universities saw measurable improvements in the recruitment, retention, and advancement of faculty and staff from a variety of backgrounds, as well as reductions in pay gaps and other differential outcomes. The use of structured interviews, standardized rubrics, and clear documentation made hiring and promotion processes more transparent and less susceptible to bias. By embedding these shifts into policy and practice, the institutions ensured the progress made would be sustained. These institutions are now exemplars in hiring, retention, and advancement systems.

Implementation Guidance

- **Audit Current Practices**
  Review job descriptions, search processes, annual reviews, promotion criteria, and onboarding experiences with a focus on a structured and transparent approach to each.

- **Establish Standardized Tools**
  Develop consistent rubrics, interview protocols, and evaluation templates to ensure fair and transparent decision-making.

- **Build Capacity of Committees**
  Provide training and guidance to search, annual review, and promotion committees to mitigate the influence of nonperformance-related factors essential for creating fair and equitable environments.

- **Invest in Development**
  Implement mentoring programs, faculty/staff fellowships, and leadership pipelines to support career advancement for all.

- **Review Pay Practices and Outcomes**
  Conduct compensation analyses to ensure employees are compensated fairly, close wage gaps where appropriate, and comply with laws and regulations regarding equal pay and nondiscrimination.

Legal Considerations

Hiring and promotion practices must comply with state and federal laws, including Title VII, Title IX, the Equal Pay Act, and any applicable state laws. Institutions should avoid criteria that amount to or imply quotas or preferences. Instead, build fair practices using race-neutral tools: objective job-related criteria, structured interviews, diverse search committees, validated rubrics, and clear promotion criteria. Conduct regular pay and applicant flow audits. Documentation of process, consistency in evaluation, and a focus on merit-based opportunity are key to reducing legal exposure.

Closing Comments

Changing hiring, retention, and promotion systems requires more than procedural tweaks. It demands courage, clarity, and a willingness to challenge long-held norms, and consistent application of structured approaches designed to produce outcomes that are fair and support success. Institutions can't afford to operate with outdated models that ignore the needs and complexity of today's workforce. Treat your recruitment, hiring, performance review, and promotion systems as strategic tools to build teams that reflect excellence, innovation, and the full range of human experience.

When done well, these practices create fairness, shape culture, and set expectations. They allow every member of the campus community to see a path forward for themselves and for the entire institution.

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INSTITUTIONAL PROGRAMMING AND OUTREACH

Introduction

Effective institutions do not respond to change — they shape it. Programming for structural change is how colleges and universities build internal capacity, challenge outdated norms, and create learning environments that reflect their public purpose. These efforts provide faculty, staff, students, and campus partners with the tools to reimagine policy and practice, and co-create more nimble, efficient, and adaptable institutions. These efforts require clarity, intentionality, and cross-functional collaboration. One-off workshops or reactive trainings are not a panacea. Instead, this work calls for higher education leaders to weave learning into the fabric of the institution. When done successfully, institutional programming becomes a force multiplier that supports cultural alignment, leadership development, and long-term success.

Purpose

To transform entrenched institutional structures by equipping individuals and organizations with the knowledge, tools, and competencies needed to identify and address inequities in policies, programs, and practices. The goal is to align institutional culture and operations with the mission, values, and long-term vision of success for all, both on campus and in the broader community.

Key Strategies and Levers	
Purposeful Design	Define the goals and scope of institutional programming clearly, grounding content in institutional mission, values, history, and local context.

Inclusive Governance	Establish an interdisciplinary Programming for Structural Change Advisory Council with representation from faculty, staff, students, and external community members.
Tiered Learning Pathways	Design developmental programming for leadership, faculty, staff, students, and partners that is aligned with their roles, readiness, and responsibilities.
Community Co-Design	Strategic partnership with local organizations to co-create public learning experiences that reflect community wisdom and reinforce mutual accountability.
Incentives and Recognition	Provide tangible benefits for participation (e.g., certificates, micro-credentials, course credit, or tenure/promotion consideration).
Interest-Based Learning	Support interest-based collaborations and convenings and cross-cultural dialogue opportunities to foster learning, accountability, and coalition building.
Leadership Integration	Integrate participation in executive and managerial development in strategic planning processes, and annual performance reviews.

Real-World Example

An institution in the District of Columbia hosted a series of activities to honor the 50th anniversary of the March on Washington. The university designed a student-friendly, world-class program, but the units within the institution were not accustomed to working collaboratively. This project was a high-profile initiative led by the president, so its success was vital. Implementation of the initiative exposed silos and hidden power dynamics that needed to be dismantled.

Communicating Programming as Strategic Capacity Building

- **Presidents and Provosts:** Emphasize alignment with mission, strategic goals, and accreditation.
- **Faculty and Staff:** Reinforce how programming supports teaching, leadership, and retention.
- **Students:** Highlight how development builds leadership, critical thinking, and cross-cultural skills.
- **Community Partners:** Show how programming builds trust and mutual accountability.

Key Message: Learning-centered programming drives structural change and strengthens institutional success.

The visibility of the work forced cooperation and established cross-functional teams across the university. When the project ended, the president instituted several strategies to ensure internal units were routinely engaged in cross-functional collaborative efforts. The university conducted an inventory of existing programming, assessed all programs' alignment with institutional goals, established collaboration structures, improved data-informed decision-making, and codified elements of the March on Washington programming within institutional structures and practices to inspire creativity and ensure sustained stakeholder engagement.

Implementation Guidance

- **Map Current Efforts**
  Conduct an inventory of existing programs and their alignment with mission and strategic goals.
- **Establish Core Themes**
  Identify three to five central themes that programming should reinforce (e.g., access, leadership, ethical reasoning).
- **Integrate Across the Year**
  Create a coordinated programming calendar tied to academic milestones, observances, and institutional priorities.
- **Empower Collaboration**
  Create cross-functional programming teams (e.g., Student Affairs, Human Resources, Academic Affairs, or Resident Life) to co-design initiatives.
- **Assess and Adjust**
  Use attendance data, feedback, and impact metrics to regularly refine offerings and ensure relevance.
- **Standardize Programming**
  Programs should serve all audiences, including students, faculty, staff, and community, and be framed as vehicles for institutional growth and leadership development.

Legal Considerations

Programming focused on opportunity should be mission-aligned and legally sustainable to avoid perceptions of compelled speech or viewpoint discrimination. Programming related to identity or belief systems should be voluntary. Programs must remain open to all and should focus on shared goals, such as student success, employee engagement, leadership, or critical thinking, to meet constitutional standards and First Amendment protections.

Closing Comments

The most effective institutions are learning institutions where new knowledge drives better decisions and deeper impact. Programming for structural change allows higher education to grow into its highest purpose: preparing individuals and communities to thrive in a complex, interconnected world. When we treat programming as a strategic investment, we create a foundation for sustainability, innovation, relevance, and systemic repair.

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EDUCATION, TRAINING, AND EMPLOYEE DEVELOPMENT

Introduction

Colleges and universities are not just learning institutions. Institutions of higher education are workplaces, civic spaces, and ecosystems that shape public discourse, critical thinking, and individual identity. How we train, develop, and invest in people across the institution speaks volumes about what we value. Professional learning opportunities must evolve beyond a performative exercise.

Education, training, and employee development must be designed to build core competencies in fairness, access, opportunity, collaboration, and mission-aligned leadership. Whether the goal is to deepen understanding, improve cross-cultural communication, or strengthen decision-making, this work is foundational to institutional effectiveness, employee satisfaction, and long-term relevance.

These efforts can help campuses navigate complexity with clarity and care, offering practical tools to reduce harm, remove barriers, and foster a culture where everyone has a stake in the institution's success.

Purpose

To build institutional capacity through intentional educational and developmental efforts that equip students, faculty, and staff with the mindset, skills, and shared language needed to lead change, foster access, engagement, success, and advance institutional effectiveness.

Key Strategies and Levers

Define Professional Development as Mission-Critical	Position learning as essential to delivering on the institution's mission, not as an optional enhancement.

Customize by Audience and Role	Avoid one-size-fits-all programming; instead, build tiered models that reflect different responsibilities, pressures, and touchpoints.
Create Feedback Loops	Use climate data, exit interviews, performance reviews, and training evaluations to continuously refine and improve offerings.
Incentivize Participation	Recognize engagement in performance reviews, tenure and promotion processes, leadership pipelines, and co-curricular transcripts.
Build Internal Expertise	Train staff, faculty, and student leaders to serve as peer facilitators and content champions.
Focus on Application, Not Just Awareness	Prioritize tools, scenarios, and exercises that promote practical use and behavioral change.

Real-World Example

One of the nation's largest community college systems has long served first-generation students, working adults, and career-changers seeking new beginnings. The college prided itself on its open-access mission, but noticed a troubling trend: declining retention among both students and frontline employees. Offline conversations revealed that many staff felt unprepared to meet the evolving needs of a diverse student body. Faculty expressed anxiety about online teaching, while academic advisors struggled with new technology and rapidly shifting regulations. The solution was not just to invest in student support and educational offerings, but also to foster a culture of continuous learning and growth for employees at every level.

The college launched a systemwide employee training and development initiative. The program offered workshops along with personalized learning pathways for faculty, staff, and administration. Recent campus culture and climate data suggest that the change was impactful, with respondents saying they felt supported and empowered. Also, there was a notable increase in job satisfaction and sense of belonging.

Communicating Professional Development as Core Strategy

- **Students:** Promote preparation for leadership in a diverse, global world.
- **Faculty:** Emphasize links to pedagogy, research, and student mentoring and success.
- **Staff:** Connect to growth, satisfaction, and effective service delivery.
- **Leaders and HR:** Connect to retention, morale, and organizational performance.

Key Message: Investing in professional development equips every stakeholder to lead through complexity.

Education, training, and employee development didn't just equip the college to handle the complexity of modern higher education; they transformed the college into a learning institution where adaptation, empathy, and innovation were the norm. Their success was a values-driven investment in the promise and truth about community colleges — when community colleges invest in the growth of the people who power them, they build stronger, more resilient communities — inside and outside the classroom.

Implementation Guidance

- **Alignment With Mission and Values**
  Ensure that training content reinforces institutional priorities and helps achieve strategic goals.

- **Legal Review**
  Work with legal counsel to confirm that programs are consistent with state, local, and federal laws. Eliminate any program language or implementation strategy that suggests compelled speech.

- **Accessible Delivery**
  Ensure programming is available across formats (in person, online, asynchronous) and meets accessibility standards.

- **Evaluate for Impact**
  Move beyond attendance tracking. Instead, use pre/post assessments, qualitative feedback, and longitudinal data to assess value.

Legal Considerations

Ensure that training avoids categorical mandates based on demographic factors, especially in politically contested topics. Use role-relevant and behavior-based content (e.g., responsive teaching, the impact of criteria not related to jobs in hiring) framed around workplace effectiveness and institutional mission. Consult with legal counsel when developing curricula that address protected classifications.

Closing Comments

Education, training, and development are how institutions prepare their people for what's next on campus, in the workforce, and in the world. Through these efforts, we honor complexity, build skill, and grow leadership at every level. If we want to lead in a changing world, we must start by learning in one.

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CAMPUS CLIMATE AND CULTURE

Introduction

Campus climate and culture play a central role in shaping the lived experiences of students, faculty, and staff — and ultimately the success of the institution itself. Colleges and universities mirror broader societal dynamics, including those that produce unfair treatment, differential outcomes, and persistent harm. However, institutions have a unique opportunity to lead by example through fostering environments where everyone can succeed, belong, and contribute meaningfully.

When culture reflects core values and climate supports well-being and respect across all identities, institutions become more effective, adaptable, and aligned with their missions. Successful campus climate work is a strategic, operational, and educational imperative.

Purpose

To assess and improve institutional climate and culture in ways that illuminate inequalities, promote access, and drive equitable outcomes. A healthy climate and culture are foundational to institutional effectiveness, academic excellence, and student, faculty, and staff success.

Key Strategies and Levers

Conduct regular campus climate assessments using validated tools to identify areas of strength, concern, and opportunity.

Disaggregate data to uncover and address differential experiences and outcomes across demographics and roles.

Audit institutional culture through qualitative and archival reviews of campus symbols, narratives, and traditions.

Invest in restorative and healing practices.

Align institutional messaging to reflect community values and ensure consistent modeling from leadership.

Embed accountability measures for addressing discriminatory behaviors and improving the campus experience.

Link climate improvement efforts to strategic planning, accreditation, and student success metrics.

Real-World Example

Student activists demanded that their Midwestern institution's access and success efforts be disbanded because they felt they were discriminatory, based on race and gender. Students protested in front of the administration building on numerous occasions. Students who supported the protest, as well as counter protestors grew with each demonstration.

Supporters argued that prospective students and employees should not have to prove their commitment to the value of diversity through the submission of diversity statements or participating in diversity training. They believed that diversity should occur without the interference of the institution. Counter protestors argued that diversity on campus requires intentional effort on the part of the university. These students relied on the results of recent climate surveys to support their claims.

The results of the campus climate assessment demonstrated that the experiences of select student groups had a negative impact on whether those students felt like they could be successful at the institution. As such, those counter protestors demanded broader representation among faculty, staff, and students. They also wanted to hold faculty and staff responsible for addressing student experiences, both inside and outside the classroom and asked that training be provided to

Communicating Climate Work as Institutional Health and Effectiveness

- **Students:** Emphasize access, psychological safety, and visible follow-up.
- **Faculty:** Connect to academic freedom, collaboration, and workplace support.
- **Staff:** Identify climate work as a foundation for engagement, respect, and role satisfaction.
- **Leaders and HR:** Show how a healthy climate improves retention, branding, and alignment.

Key Message: A thriving campus climate supports the mission and success of every community member.

all employees to address biases. As tensions on campus escalated, student activists took control of the university's administration building.

The university president deployed these strategies and convened a cross-functional crisis management squad, which included legal, risk management, communications, campus police, local police, and mayor's office representatives. The president also met with the leadership of both student groups to hear their concerns and used that feedback to inform the institution's response. The crisis management team employed a rapid response communications team to monitor all social media platforms and identify stakeholders who could support the university's message and amplify their position in the culturally and politically uncertain environment.

Implementation Guidance

- **Phase 1: Establish the Foundation**

  Select a validated assessment instrument appropriate for your institutional context.

  Build a cross-functional team to manage implementation and analyze results.

  Develop a communication strategy to explain the purpose, process, and intended outcomes.

- **Phase 2: Act on What You Learn**

  Use survey results to guide targeted interventions, such as bias response systems, holistic programming, or employee resource groups.

  Pair quantitative findings with listening sessions to understand lived experiences more deeply.

  Audit institutional artifacts (building names, website images, historical language) for alignment with community values.

- **Phase 3: Embed and Sustain Culture Change**

  Integrate climate improvement goals into institutional/departmental strategic plans, hiring and onboarding processes, and leadership evaluations.

  Celebrate progress and reinforce institutional values through storytelling, awards, and public accountability.

  Reassess every two to three years and adjust based on outcomes and feedback.

Legal Considerations

Climate assessments must protect anonymity and confidentiality under FERPA, HIPAA (for health-related data), and employee privacy laws. Use validated instruments and disclose how results will be used. When addressing climate concerns, avoid actions that could expose feedback from a vulnerable survey participant. In circumstances where an actual complaint is lodged in survey feedback, engage formal grievance procedures and related services or offer informal resolution where both parties consent. Contextualize the importance of climate initiatives for institutional effectiveness, access, and risk reduction.

Closing Comments

Campus climate is both the heartbeat and the barometer of institutional health. When approached with rigor and compassion, climate work becomes a powerful lever for transforming culture, aligning operations with mission, and creating conditions where every person can succeed. A positive climate doesn't happen by accident. Rather, climate is built, measured, improved, and protected over time. Institutions that take this seriously position themselves to lead in the evolving landscape of higher education.

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ADMISSIONS AND ACCESS

Introduction

Admissions and access are among the most visible and contested arenas in the pursuit of fairness and opportunity in higher education. How colleges and universities make decisions about who is admitted, who can afford to stay, and who is positioned to thrive directly reflects their values. These decisions not only shape individual lives but also determine whether institutions are contributing to a more just society or reinforcing persistent inequalities.

Today, access barriers remain widespread and deeply intertwined with income, geography, school quality and resources, and longstanding structural disadvantages. Efforts to reframe admissions practices for sustainability must acknowledge that prevailing policies often yield unequal outcomes. At the same time, institutions must confront the parallel challenge of ensuring equitable access to high-impact learning opportunities that shape student success long after enrollment.

Admissions and access strategies must evolve to reflect both legal realities and moral commitments. Doing so will require courage, creativity, and a willingness to design student-centered pathways that reward potential, recognize lived experience, and create new opportunities for upward mobility for all.

Purpose

To use legally sound strategies that expand access to institutions of higher education and access to high-impact educational opportunities for students from all backgrounds. This includes identifying and removing structural barriers in the admissions process and ensuring opportunities to participate in internships, research, leadership programs, and other experiential credentials.

Conduct comprehensive staff and protocol audits of admissions practices, including criteria, outreach strategies, and decision-making frameworks.

Eliminate legacy admissions preferences and other policies that disadvantage all other groups.

Develop frameworks that incorporate adversity indices, first-generation status, school context, and community leadership.

Create and promote transparent, accessible pathways for transfer students.

Invest in high-impact experiential learning programs and ensure equitable participation across student demographics.

Partner with K-12 systems, community organizations, and a range of minority-serving institutions to strengthen outreach and readiness.

Real-World Example

Admissions and access are the most visible places where institutional values emerge for full display to the communities they serve and the students they select. Prior to the 2023 U.S. Supreme Court Ruling, SFFA v. Harvard, nine states already had laws or ballot initiatives that prohibited race-conscious approaches to public employment, education, and contracting. Over time, institutions adopted strategies to honor their commitment to fairness, access, and opportunity.

Many colleges and universities have adopted key strategies to admit a diverse student body that are intended to be compliant with the law:

- **Holistic Review:** Considers a wide range of factors, including academic achievement, socioeconomic background, first-generation status, school context, and leadership experience.
- **Contextualized Admissions:** Evaluates applicants in the context of their high school and community resources.
- **Top 9% Plan:** Guarantees admission to a University of California campus for California high school students in the top 9% of their class.

Communicating Access Strategies as Excellence and Readiness Tools

- **Students and Families:** Reinforce that promise and opportunity drive admission.
- **Faculty:** Emphasize how student perspectives, lived experiences, and more enhance teaching and learning.
- **Admissions Professionals:** Highlight transparency, promote equal opportunity, and strategic, mission-aligned enrollment.
- **External Stakeholders:** Showcase how access advances workforce development and civic growth.

Key Message: Expanding access ensures institutions serve the public good with excellence and integrity.

- **Extensive Outreach:** Invests in K-12 partnerships and outreach to underserved communities.
- **Robust Transfer Pathways:** Maintains clear, accessible transfer agreements with California Community Colleges (e.g., Associate Degree for Transfer and Transfer Admission Guarantee programs).
- **Predictive Analytics:** Identifies at-risk students and triggers targeted intervention.
- **Micro-Grants:** Provide emergency financial support to prevent dropouts.
- **Proactive Advising:** A large advising team uses data to reach out to students.

Implementation Guidance

- **Legal Compliance and Innovation**
  Align policies with current law while pursuing innovative, mission-aligned pathways that expand opportunity.
- **Data Disaggregation**
  Track access and outcomes by geography, first-generation status, income, veteran status, race, gender, disabilities, and more.
- **Pipeline Development**
  Create formal articulation agreements and pipeline programs with all institutional types and local school districts.
- **High-Impact Experience Access**
  Integrate access to internships, research, and service-learning into advising systems, financial aid, and academic programming.
- **Mindset Change**
  Contextualize admissions and access as commitments to academic excellence, community impact, and economic mobility.
- **Financial Support**
  Invest in need-based aid, emergency grants, and debt reduction strategies for students with the highest barriers to enrollment and persistence.

Legal Considerations

In its 2023 decision in Students for Fair Admissions v. Harvard and UNC, the Supreme Court struck down race-conscious admissions policies as violating the Equal Protection Clause. Institutions must therefore ensure admission policies and practices are race-neutral and mission-aligned using for example: adversity indices, first-generation status, and school context. Ensure all admissions criteria are clearly defined, consistently applied, and transparent. High-impact opportunities (e.g., honors programs, scholarships) must be open to all qualified students without demographic exclusivity.

Closing Comments

Admissions and access are not just administrative processes; they are expressions of an institution's mission and worldview. By designing systems that acknowledge structural barriers and invest in student potential, institutions can build a more adaptable, effective, and socially responsive higher education landscape. Doing this ensures that opportunity is based on talent, tenacity, and the promise of added value and community contribution.

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STRATEGIC COMMUNICATIONS AND STORYTELLING

Introduction

In today's climate, where public skepticism and politicized narratives increasingly influence perceptions of higher education, the ability to clearly articulate purpose and reinforce shared values is essential. Institutions are being asked to explain what they do, why it matters, and who they serve. In this context, communications cannot be an afterthought or relegated solely to a press office. Strategic messaging must be embedded into the fabric of institutional life, aligning across leadership, operations, and community engagement. Higher education leaders must elevate communication and storytelling as tools for institutional clarity, cultural coherence, and long-term sustainability.

Messaging on values, opportunity, and inclusion can be considered:

- Institutional values to include fairness, which ensures everyone has a fair chance to demonstrate their merit;
- Emphasis can be placed on the opportunity to succeed as a right of all people and;
- An environment created where all individuals feel valued and respected.

Purpose

To strengthen public understanding of access and fairness by establishing clear, values-driven communication that reinforces institutional mission, counters misinformation, and supports a culture of access, opportunity, success for students, faculty, and staff, extending well beyond the borders of the campus.

Key Strategies and Levers

Partner with communications professionals to craft a core values message platform that includes clear language around fairness, opportunity, and educational excellence.

Educate leadership and key staff to serve as institutional ambassadors across academic, student affairs, and operational units, and consider approaches to amplify student voices when crafting core values messages.

Build a rapid response infrastructure with message guides, scenario planning, and media training to navigate misinformation or political pressure.

Center human stories alongside data by highlighting student, faculty, and staff experiences that show the lived impact of institutional initiatives.

Highlight the impact of research on local and broader society in all areas of life.

Establish alignment across units by embedding communications liaisons into councils, external affairs offices, and cabinet-level meetings.

Real-World Example

An urban state university worked on reputational recovery after a scandal. The institution had new leadership, vision, and energy. Institutional leaders were excited for opening weekend, but there was a rash of car and residence hall break-ins, and even armed assaults, during the campus move-in period. Electronics, bedding, cash, and family heirlooms were stolen. The surrounding community was in an uproar and news of the thefts spread quickly throughout the community. The university sprang into action and employed a number of strategies immediately.

Institutional leaders convened a rapid response team of public safety, communications, legal, and risk management staff to assess the situation and devise a safety and communications plan. The communications team established a social media rapid response team to monitor chatter about the incidents and respond appropriately. Institutional leaders, including the city's police chief along with campus police leadership, met with the affected families immediately, shared their plan of action, and provided opportunities for families to ask questions and express concerns. Additionally, campus police increased their presence and displayed public safety signage in the dorms, parking lots, and surrounding campus areas. Lastly, the university leaders installed additional cameras in blind spots across the campus.

Communicating with Clarity and Credibility

- **Faculty:** Link messages on fairness and opportunity to scholarship, research, outcomes, and teaching impact.
- **Staff:** Emphasize consistency, alignment, and credibility in public messaging.
- **Students and Families:** Reinforce access, value, and institutional integrity.
- **Donors and Media:** Showcase stories of impact, data outcomes, and societal contribution.

Key Message: Strategic storytelling bridges institutional values and public trust.

The university communications team's proactive storytelling and consistent community engagement were successful. Community groups expressed support for the institution, and community leaders offered support and comfort to families. These intentional engagement efforts made students and their families feel safe and supported.

Implementation Guidance

- **Governance and Coordination**
  Create a standing communications working group that includes strategic communications, government relations, legal counsel, administrative leadership, and academic affairs. This group should review key messaging for consistency and alignment.

- **Compliance and Transparency**
  Ensure that public messaging aligns with federal and state compliance standards, especially in contexts involving demographic data, Title VI and Title IX matters, or court rulings related to admissions and employment practices.

- **Community Input and Vetting**
  Test key messages and communication tools with a cross-section of stakeholders (e.g., students, faculty, staff, alumni) to ensure resonance and avoid unintended consequences.

- **Media relations**
  Maintain positive media relationships and prepare faculty and staff with training and talking points before high-profile events, court decisions, or legislative sessions.

- **Digital alignment**
  Regularly audit websites, social media, marketing materials, and recruitment content to ensure they reflect up-to-date language, accurate data, and broad representation.

Legal Considerations

All public communications — including websites, reports, and statements — should be reviewed to ensure alignment with current legal and compliance standards, especially in matters related to demographic data, employment, and admissions. Implied or actual protected-category-based preferences should be eliminated. Use mission-centered, values-driven language and ensure that storytelling efforts are responsive, truthful, and accessible under ADA requirements.

Closing Comments

Messaging is not just about what an institution says. It is also based on what people hear, feel, and remember. Higher education leaders have an opportunity to reclaim the public narrative and tell a more complete story about how access, fairness, and opportunity drive institutional excellence. Clear, values-driven communications help bridge the gap between institutional intent and public understanding. They also protect and reinforce mission-critical work by ensuring the campus speaks in one voice, even as it embraces many perspectives.

Resources

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DATA USE, METRICS, AND ACCOUNTABILITY

Introduction

The use of data is no longer a backend function; it is a leadership imperative. In a climate where transparency, resource optimization, and accountability are central to institutional success, colleges and universities must treat data not simply as a reporting requirement but as a strategic asset. Measurement is about learning. It is about knowing what's working, what's not, and what must be done next to uphold the promise of opportunity and success for everyone. Institutions must invest in data systems, capacity building, and cultures that support the meaningful, ethical use of information to guide decisions and demonstrate progress.

Purpose

To elevate the role of data, assessment, and evaluation in creating organizations where all individuals can thrive and contribute their full potential.

Key Strategies and Levers	
Build Comprehensive and Ethical Data Infrastructure	Develop systems that capture student access, progression, success, and climate data alongside faculty/staff demographics and institutional practices. Disaggregate, for example, across race, gender, income, first-generation status, disability, geography, and other demographics, while protecting privacy and complying with law.
Use Data to Drive Strategy and Investment	Integrate data into strategic planning, budgeting, and evaluation. Use insights to prioritize interventions and improve outcomes in real time.

Promote Data Literacy and Capacity	Train administrators, faculty, and staff to understand that data reflecting differential outcomes may point to systems that require closer scrutiny and change. This training includes the ability to properly interpret data and how to translate findings into action. Promote data-informed dialogue across departments.
Evaluate Impact, Not Just Activity	Move beyond activity-based reporting to assess what interventions actually change outcomes. Use theory of change models and both quantitative and qualitative evaluation methods.
Share Results Transparently	Communicate insights widely in accessible formats. Use data storytelling to connect performance metrics to mission and values, especially with public, governing, and philanthropic audiences.

Implementation Guidance

- Create or revise data governance policies that explicitly include fairness, inclusion, and transparency principles.
- Develop dashboards with actionable metrics aligned with institutional mission and strategic goals.
- Conduct climate assessments and publish summary findings alongside planned follow-up actions.
- Allocate funding for data system upgrades and professional development.
- Build partnerships with institutional research, IT, and student success units to ensure alignment across data work.
- Foster a culture of continuous improvement where data are collected to gain insight.

Real-World Example

Two years after implementing a strategic plan, a large public university sought to better understand how its faculty and staff were continuing to advocate, support, and advance student, faculty, and staff success amid recent legislative changes that created environments on campuses that made progress difficult. The college

Communicating Data Use as Strategy, Not Surveillance

- **Faculty:** Link data to improved instruction and curriculum outcomes.
- **Staff:** Frame data as a tool to solve challenges, not penalize behavior.
- **Students:** Show how data improve services and reflects their voices.
- **Leaders and Trustees:** Emphasize strategic decision-making and mission accountability.

Key Message: Ethical, actionable data use builds trust and drives measurable impact.

understood that these changes had different effects on different campus constituencies. Therefore, it needed to understand how best to support the campus during a time when it was challenging to advance student, faculty, and staff success.

The university did not want to rely on anecdotal data to gain this insight. Instead, it collaborated with consultants to develop a survey instrument that would inform a clear picture of the demographics, institutional role, and socioemotional state. The organization asked all faculty and staff to participate in this survey and share insights on how they were continuing to do their jobs.

Many respondents did not consider their work manageable or predictable. Respondents said they were "overwhelmed" and "upset." Depending on a number of differential factors, respondents reported they were more stressed in their current roles than they were in previous ones. Additionally, faculty and staff who had less seniority at the university were more likely to report feeling overwhelmed, upset, and stressed while those who had more seniority were more likely to say their work was fulfilling and rewarding.

The institution decided it needed to act. It not only shared the results widely with campus faculty and staff, but administrators as well. It stressed the importance of reviewing the results, and focused on creating additional tools and implementing strategies that would support faculty and staff. It partnered with several local community resources, higher ed associations, and national foundations to identify and deliver more resources, facilitate more campus convenings, and provide more professional development opportunities to its faculty and staff.

As external challenges continued, it decided to repeat the assessment two years after it conducted the first study. Again, the results were insightful, about one-third of respondents said their unit efforts or office had changed or reorganized over the last two years, more than half said their budgets had decreased, and most respondents indicated their work is less predictable, more stressful, and more upsetting than it was three years prior.

As a result of this assessment, the university president sought to develop a resource that would support faculty and staff in advancing their work, even when external conditions were challenging. The president teamed with local, state, and

national organizations who she understood were facing similar challenges, and encouraged senior leaders, working with campus scholars, and a consultant to create a suite of services, including a guide, that would aid the institution in their quest to advance students, faculty, and staff success, no matter the conditions. The support has been received well, and several institutions have reached out to learn more about the steps taken to implement the strategies on their campuses. To continue making progress, the university will conduct its assessment on a routine basis to regularly assess the climate and responses to change efforts.

Legal Considerations

Institutions must ensure that data collection, storage, and reporting practices comply with FERPA, Title VI, Title IX, and state and/or local privacy laws. Disaggregation by race, gender, or income must be handled with strict confidentiality and used solely for legitimate institutional interests. Establish clear governance protocols for data use, access, and sharing. Avoid using data for punitive measures and instead frame it as a strategic and educational tool.

Closing Comments

Maximizing the role of data does not mean reducing human experience to numbers. It means using evidence to act responsibly, fairly, and efficiently. Institutions that embrace ethical data use will be better positioned to deliver on their promises to students, employees, and the public. By grounding access and fairness efforts in measurable outcomes, leaders move beyond symbolic commitments to results that are real, trackable, and transformative.

Resources

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LEGAL LITERACY AND RISK NAVIGATION

Introduction

Higher education institutions today operate in a volatile legal and political environment. Federal and state-level shifts in civil rights enforcement and academic freedom have introduced new uncertainties, particularly for institutions committed to advancing fairness and opportunity. While many institutions rely on legal counsel for compliance, a reactive approach is insufficient. A broader base of legal literacy among presidents, administrators, faculty, staff, and student affairs professionals is essential to protecting core values while adapting to evolving mandates.

Legal clarity not only mitigates risk; but it also strengthens confidence. Institutions that invest in legal and policy fluency are better equipped to build sustainable, mission-aligned practices that withstand external scrutiny. By embedding legal strategy and risk management into this work, colleges and universities can ensure that their commitments are lawful, principled, and enduring.

Purpose

To build institutional capacity for legal strategy, risk management, and policy design that supports sustainable access, fairness, and opportunity work across higher education.

Key Strategies and Levers

Provide accessible legal and compliance education to all campus leaders, faculty, and staff. One misstep by a well-intentioned but misguided person could jeopardize the lawful work of all.

Embed legal risk assessments into the planning and rollout of new programs, policies, or public statements.

Establish cross-functional advisory groups, bringing together legal, academic, and policy expertise to review sensitive or high-impact initiatives.

Track legislation, court decisions, and regulatory changes to adjust institutional strategy accordingly.

Build trust with the campus community, academic governance, and broader community by keeping these stakeholders informed.

Engage external partners (e.g., civil rights scholars, national associations, amicus brief authors) to inform and align policy frameworks.

Real-World Example

A university in the South invested heavily in preparing for the Students for Fair Admissions ruling. Admissions leadership worked with legal counsel to train frontline staff, revise review processes, and align practices with the new legal landscape. However, one overlooked area proved costly: training for faculty and staff outside the core admissions team.

At a universitywide retreat, a faculty member who served informally on an admissions advisory group remarked, "We all still know what we're looking for when we talk about 'perspective' or 'background,' right?" The statement, made in front of dozens of colleagues, was interpreted as an admission that race was still being used informally in admissions decisions. The comment was reported internally, then leaked to student media, and ultimately drew national attention.

A legal advocacy group filed a complaint with the Department of Education's Office for Civil Rights. Trustees raised concerns, and faculty withdrew from admissions-related activities, fearing further missteps.

This incident illustrates that legal literacy must extend beyond core offices. One untrained voice, especially in a public or multistakeholder setting, can unintentionally jeopardize legally compliant work. To mitigate risk:

• **Train Broadly:** Extend legal literacy to all who touch or talk about admissions, including faculty, staff, and public-facing communicators.

Communicating Legal Literacy as a Leadership and Innovation Tool

- **Senior Leaders:** Reinforce legal clarity as key to protecting mission and strategy and should be standard, not just in a moment of legal crisis.
- **Faculty and Staff:** Emphasize empowerment through policy fluency and alignment.
- **Students and Advocates:** Build trust by showing how law and values coexist.
- **External Audiences:** Ensure that the institution is compliant, courageous, and principled.

Key Message: Legal literacy ensures fairness and opportunity is sustainable and defensible.

- **Vet Messaging:** Distribute clear guidance on legally appropriate language following major legal rulings.
- **Create Advisory Loops:** Establish cross-functional teams to review high-risk practices and identify undertrained groups.
- **Foster Legal Awareness as Culture:** Move beyond compliance as a checklist and embed it as a shared institutional responsibility.

Implementation Guidance

- **Engage Legal Counsel Early**
  Collaborate with legal teams to review existing policies, frameworks, and campus communications.
- **Develop a Legal Primer**
  Create plain-language guides on relevant federal and state regulations (e.g., Title VI, Title VII, FERPA, SFFA v. Harvard).
- **Provide Targeted Training**
  Offer differentiated legal literacy sessions for trustees, faculty, staff, and student leaders.
- **Create Review Cycles**
  Establish recurring timelines for policy review and updates, ensuring documents stay current and mission-aligned.
- **Integrate Legal Guidance**
  Ensure new programs, strategies, and language are legally vetted before rolling out to the public. By proactively embedding legal awareness into decision-making, institutions reduce risk and increase confidence in their commitments to fairness and opportunity.
- **Resource Considerations**
  Ensure access to timely legal updates, external counsel as needed, and translation of legal guidance into practical toolkits for unit-level leaders.

Legal Considerations

Ensure all training, audits, and briefings are guided by legal counsel and focus on relevant federal (e.g., Titles VI, VII, IX), state, and local laws. Track court rulings and policy shifts and develop proactive legal strategies with your general counsel. Ensure that legal interpretations are consistently applied and updated in policy documents, training modules, and executive communications.

Closing Comments

A lack of legal clarity can stall institutional action — or worse, invite backlash. But thoughtful, anticipatory legal strategy can unlock creativity, protect academic integrity, and reinforce commitments to access, fairness, success for students, opportunities, and engagement with other constituents and stakeholders, including alumni. Rather than approaching law as a constraint, higher education leaders must see it as a design parameter that ultimately shapes sustainable, values-aligned institutions capable of serving all communities with care.

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EXTERNAL PARTNERSHIPS AND COMMUNITY ANCHORING

Introduction

Higher education does not exist in a vacuum. The systemic challenges that institutions face regarding access, fairness, and opportunity are deeply connected to broader societal dynamics. Colleges and universities must therefore look beyond their own institutional borders to develop meaningful collaborations with organizations, governments, industries, and communities that share a stake in shaping a more prosperous society for all. These partnerships provide access to additional resources, specialized expertise, and critical networks that can enhance institutional capacity and drive systemic change.

In a climate of increasing scrutiny and polarization, strategic partnerships help institutions affirm their relevance and deepen their impact. Whether through joint research, shared pipeline programs, or collaborative community engagement efforts, external partnerships strengthen trust, amplify innovation, and create new opportunities for students and communities alike. By integrating these efforts in mission-aligned strategies, institutions can build lasting relationships that extend the reach and sustainability of their fairness, opportunity, and access commitments.

Purpose

To foster cross-sector partnerships that expand institutional capacity, meet an identified need, advance outcomes for all, and build collaborative infrastructure for systemic change in higher education and beyond.

Key Strategies and Levers

Define Strategic Alignment	Clarify how each partnership meets a community need, supports institutional values, strategic priorities, and long-term goals.

Key Strategies and Levers *continued*

Diversify Partnership Types	Engage in a variety of collaborations, including strategic alliances, research consortia, funding relationships, community partnerships, and innovation pilots.
Capacity Building for Effective Partnerships	Build capacity of campus leaders, faculty, staff, and students to engage and work effectively with diverse community partners.
Establish Evaluation Criteria	Use shared metrics to assess strategic fit, capacity alignment, financial health, risk exposure, and cultural compatibility.
Develop Relationship Infrastructure	Build internal systems for partnership governance, coordination, communication, and accountability.
Invest in Trust Building	Prioritize authentic and sustained engagement with communities and organizations, reflective of the institution's mission, vision, and values.
Leverage Influence for Policy Change	Work with associations, policymakers, and industry groups to advocate for systemic improvements that benefit students and communities.

Real-World Example

A public state college had teamed with local retailers to ensure the retailers' inventory was affordable for students. Through this partnership, retailers built a network that introduced small, local businesses to big box retailers. In this partnership structure, all parties benefited. The university could refer students to reliable and affordable options for select goods and services; small businesses had an opportunity to serve customers locally and expand their reach; and big-box businesses had an opportunity to broaden offerings and strengthen local economies.

Communicating Partnerships as Public Purpose in Action

- **Leadership and Boards:** Showcase partnerships as drivers of strategic growth and innovation.
- **Faculty and Staff:** Highlight how collaborations extend research and applied learning.
- **Students:** Emphasize opportunity access and shared investment.
- **Broader Community:** Engagement with and impact on the surrounding community, and, where appropriate, engagement nationally and globally.
- **Funders and Policymakers:** Reinforce joint impact on economic mobility and civic vitality.

Key Message: Strong partnerships deepen institutional relevance and multiply impact.

When a fire struck a first-year residence hall, this partnership was activated. Not only did students have a supportive, reliable source to replace lost or damaged items, students were also provided replacements for free. Local retailers stepped up to offer generous gift cards to affected students and the university extended a tuition discount to further support these students.

Implementation Guidance

- **Inventory and Categorize Partnerships**
  Map current collaborations and assess their strategic, educational, and reputational value.

- **Define Criteria for Engagement**
  Develop partnership principles rooted in mutual benefit, ethical conduct, understanding diverse perspectives, co-creation, and public purpose.

- **Create Governance Structures**
  Establish memoranda of understanding templates, review protocols, and vetting procedures for new and existing partners.

- **Empower Internal Champions**
  Identify faculty, staff, and students who can serve as liaisons to anchor and sustain community engagement.

- **Measure and Share Impact**
  Use data to track outcomes on student learning, workforce development, and social impact, and share the results publicly.

- **Resource Considerations**
  Allocate funding for partnership coordination roles, digital tools for relationship management, and legal review to support sustainable collaboration.

Legal Considerations

External agreements and partnerships must undergo contract and risk review to ensure compliance with institutional conflict-of-interest, data sharing, and liability standards. Pay attention to branding, co-ownership of programs, and intellectual property rights. Community-based work must include proper vetting to avoid mission drift or legal entanglements. Ensure that all collaborations advance the institution's public purpose and comply with nonprofit status requirements, if applicable.

Closing Comments

The future of higher education depends on what institutions can achieve with others, not just on their own. When partnerships are mission-aligned, well-managed, and rooted in shared values, they extend the institution's reach, credibility, and capacity to solve complex challenges. By investing in collaborative infrastructure, colleges and universities model the kind of cross-sector leadership needed to advance fairness and opportunity in a rapidly changing world.

Resources

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FUTURE PLANNING AND INSTITUTIONAL AGILITY

Introduction

Everyone plays a role in shaping the future. This intergenerational responsibility reminds us that advancing fairness, opportunity, and access today builds a stronger, fairer society for tomorrow. Higher education, as a public good, has long carried the promise of equal access. Now, we must fully realize that promise by dismantling barriers to access and opportunity, deliberately designing and implementing policies and procedures that foster fair outcomes and expand opportunities for all, investing in shared civic identity, and affirming that every person is a vital part of the American story.

In doing so, we actively embrace multiple truths, traditions, and contributions in pursuit of the common good. This principle centers our collective responsibility: to create a civil society where every individual feels valued and empowered to shape their own future.

Purpose

To reframe the national conversation around inclusion by emphasizing shared responsibility, pluralism, and intergenerational stewardship as core components of higher education's mission and societal contribution.

Key Strategies and Levers

Promote pluralism, civic engagement, and shared civic responsibility as cornerstones of the institution's public mission.

Conduct audits of systems, policies, and structures to identify and dismantle persistent barriers.

Integrate intergenerational responsibility and legacy-building into institutional messaging and strategic planning.

Reframe access and fairness not as political issues but as societal imperatives that support economic and civic health.

Champion education as a public good through communications, partnerships, and alumni engagement.

Real-World Example

A specialized program within a Midwestern university received an endowment to go from an interdisciplinary program to a school within the university. The founding student body of graduate students, faculty, and staff were thrilled. They believed in the program's promise and thought the content and culture of the program would not be lost in the transition. The new school received extensive guidance concerning governance, but program leadership wanted to make sure that its core values remained intact. The program leaders also wanted to ensure those who had benefited from this interdisciplinary pedagogy would have a voice in its future formation.

An advisory committee that included current students, faculty, and its creative community was formed. This group was empowered with decision-making power and worked to ensure a consistent climate and culture during the transition from a program to a school. By intentionally maintaining the original culture of inclusion, fairness, opportunity, intergenerational stewardship, and intentional public good, the program-turned-school is now a success model for other schools and colleges within the university and is one of the most sought-after programs in the nation.

Implementation Guidance

- Establish institutional legacy initiatives that frame the work to create opportunity and access for all as a multigenerational investment.
- Launch storytelling campaigns centered on the long-term impact of fairness-focused reforms.
- Embed public service and civic engagement requirements tied to institutional mission.
- Conduct annual reviews of inclusive metrics tied to future-readiness and social progress.

Communicating Universal Access as Intergenerational Stewardship

- **Students:** Position them as architects of the future, empowered to lead now.
- **Faculty and Staff:** Emphasize their role in legacy-building through mentorship and innovation.
- **Leaders:** Promote this as strategic foresight tied to civic and institutional relevance.
- **Alumni and Donors:** Connect today's reforms to tomorrow's progress and institutional longevity.

Key Message: Future planning is about designing a society where fairness and opportunity endure for generations.

- Include long-horizon strategic visioning that incorporates the next 50 years, not just the next five.

Legal Considerations

Strategic planning that includes pluralism must be carefully contextualized to align with institutional mission and values. Language should focus on outcomes (e.g., student/faculty/staff success, community engagement, research that transforms lives and addresses inequities, institutional sustainability, public trust). Ensure planning documents are reviewed for consistency with legal mandates and risk frameworks. Incorporate legal foresight into scenario planning, accreditation reviews, and presidential performance metrics.

Closing Comments

We own our destinies and shape the future with every policy and practice we implement today. Higher education must embrace its role as a catalyst for civic renewal and intergenerational fairness. This priority area reminds us that these efforts are about planting seeds for a thriving, pluralistic society where future generations can flourish.

Resources

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MONITORING AND CONTINUOUS IMPROVEMENT

Sustainable institutions learn as they lead and are guided by their mission and values.

To ensure lasting impact, fairness, and opportunity, strategies must be built on cycles of evaluation, reflection, and refinement. Monitoring is predicated on stewardship, alignment, and course correction when needed. The following practices can help institutions stay accountable and adaptable:

How to Assess Impact Across Priority Areas

- Disaggregate outcomes data (e.g., retention, hiring, resource allocation, admission, persistence, graduation) by race, income, gender, first-generation status, geographic areas, disability, and other demographics.
- Connect strategy to performance through clear, measurable indicators across all 15 focus areas.
- Track process and outcomes to evaluate whether interventions led to tangible improvements in experience, access, or advancement.

When to Review or Update

- Annual check-ins aligned with strategic planning, accreditation cycles, or budget timelines.
- Post-implementation assessments conducted six to 12 months after launching major policies or programs.
- Responsive reviews when legal, political, or demographic conditions shift.

Tools for Impact and Transparency

- Scorecards to benchmark and track institutional progress.
- Real-time dashboards for internal use by leadership and units to monitor performance.
- Climate surveys every two to three years to assess lived experience and trust.
- Public-facing reports to reinforce transparency and build stakeholder confidence.

Continuous improvement is a leadership discipline. Institutions that measure what matters and act on what they learn are better positioned to uphold mission, build trust, and thrive in complexity.

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